PRELIMINARY ASSESSMENT OF THE ALBERTA GARDEN SUITE PILOT PROJECT

Alberta

MUNICIPAL AFFAIRS

PRELIMINARY ASSESSMENT

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Prepared by

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for

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EXECUTIVE SUMMARY

Alberta Municipal Affairs is undertaking a garden suite pilot project as a joint and cooperative effort with the City of Lethbridge and the County of Parkland. In this project, garden suites are self-contained residential units located on the property of a host family to accommodate and facilitate the provision of support services for one or two elderly relatives.

The main objectives and scope of the pilot project are:

1. to design, manufacture/construct, place and operate up to six garden suites, with up to three in Lethbridge and up to three in the County of Parkland;

2. to establish and implement a joint provincial-municipal approval process for locating and controlling the use of the garden suites;

3. to evaluate and recommend on the appropriateness of garden suites as a housing option for the elderly in rural and urban settings and for different income groups, as well as conditions and procedures for implementing this housing option if appropriate; and

4. to remove the units after the conclusion of a three year demonstration and evaluation period as appropriate, or before, if the project must be abandoned for any reason, such as the departure of the occupant(s) of the garden suite(s).

In order to evaluate and recommend on the appropriateness of garden suites as a housing option for the elderly, the following key issues have been identified to be monitored and evaluated throughout the course of the project:

1. Demand for garden suites as a form of supportive housing in urban and rural areas;
2. Assessment of care and services provided;
3. Appropriateness of unit design;
4. Appropriateness of unit construction and foundation techniques used;
5. Appropriateness of servicing techniques used;
6. Assessment of placement methods;
7. Appropriateness of siting criteria;
8. Neighbourhood impact;
9. Cost effectiveness of garden suites as a form of supportive housing;
10. Methods for delivery and control of garden suites; and
11. Appropriateness of garden suite concept.

Final evaluation and recommendations on these issues are expected by March, 1992. However, in order to gain as much insight from the pilot project as early as possible, monitoring and evaluation activities are being carried out in a series of sequential studies. The first of these studies has been completed and has resulted in this preliminary assessment report of the garden suite pilot project. This report provides an assessment of those eight of the foregoing issues which could best be addressed on the basis of available data.

The preliminary assessment is primarily based upon the initial attitudes and positions of key individuals and relevant groups with respect to the eight issues investigated. These attitudes and positions were obtained through surveys and interviews, and have been assessed in terms of appropriate measures. The assessment pertains to two units in Lethbridge and two in Parkland, the only units in place at the time of this evaluation.

The eight issues addressed and the preliminary assessment of each are summarized below.

1. Assessment of Care and Services Provided

All occupants reported that the quality of care and service provided by the host family either remains unchanged or has improved since moving into the garden suites. Their care and service needs (emotional support and security, transportation, accompaniment to medical appointments and on shopping expeditions, and heavy cleaning assistance) are being met and their overall quality of life has improved significantly. The improvement is directly related to the proximity of the suites and being physically removed from the host dwelling. In all cases, the relationships with the host families either remained unchanged or improved.

In all cases, the impact on the host families of providing required care and services in the garden suites has been positive. Close relationships with the occupants have been maintained and any stress resulting from distance, concern over the parents future, safety and emotional well being of the parent has been eliminated. All host families reported an improvement in their quality of life.

Although the current garden suite rents of $400 per month are higher than rents charged for most government subsidized seniors housing options, neither the occupant nor the host families considered the cost of living in the garden suites to be excessive in light of the benefits of living in the units.

2. Appropriateness of Unit Design

Occupants, host families, neighbours, industry and sponsoring agency representatives all expressed general satisfaction with the design and overall appearance of the units. Occupants were generally pleased with the interior design features, accessibility, liveability and comfort level of the units. A couple occupying one of the units did express some concern with

accessibility in the entrance/dining area. This concern is significant in that one of these occupants requires a walker and/or wheelchair. The exterior appearance of the unit met with the unqualified approval of all occupants. Similarly, all host families were very pleased with both the exterior appearance and the interior layout. Neighbour responses indicate that the appearance of the unit is pleasing and compatible with the neighbourhood. Finally, although suggestions for improvement were made, industry and sponsoring agency representatives all expressed general satisfaction with the unit design and aesthetics.

3. Appropriateness of Siting Criteria

The units appear to be appropriately sited. Both the occupants and host families are generally pleased. Also, none of the neighbours felt they were impacted by the siting of the units. The siting criteria as defined by the project conditions appear appropriate.

4. Appropriateness of Unit Construction and Foundation Methods Used

No major problems were encountered in constructing the units using traditional manufactured housing construction techniques. Technically, the units' building envelopes and mechanical systems are performing well. Although some minor problems were identified by the occupants, these have all been investigated and rectified.

In both municipalities, the standard foundation techniques used were considered the most suitable and cost effective considering local soil conditions. None of the host families or neighbours were unduly imposed upon by the foundation preparation process.

5. Appropriateness of Servicing Techniques Used

Most services for garden suites were provided by hooking into those of the host dwellings. The Lethbridge families rated the servicing process as satisfactory. The process was quick and efficiently coordinated. Neither families nor neighbours were unduly imposed upon. In Parkland, one of the two families rated the process as satisfactory. The second family rated it as unsatisfactory based on the perception that the process was too lengthy and uncoordinated. Coordination appears more difficult to achieve in rural areas because of the distance factor.

From the manufacturers' perspective, no major problems were encountered although extra costs and effort resulted because of cold weather and frozen ground conditions.

6. Assessment of Placement Methods

In Lethbridge, a crane was used to hoist and place both units. In Parkland, the units were "rolled" into place. The two methods used reflect the inherent differences between urban and rural locations. Each was most appropriate given the local site characteristics, appears to have worked well, and was cost efficient.

7. Appropriateness of Methods for Delivery and Control of Garden Suites

Raising Public Awareness and Soliciting Applications

A multi-pronged approach was used for raising local public awareness and soliciting applications. This approach included wide distribution of fact sheets and application forms, advertisements in local newspapers and encouragement of media coverage. Nevertheless, none of the applicants or neighbours were aware of the public awareness program and most sponsoring

agency representatives felt that more program time and effort was required. Greater effort, they felt, may have resulted in more applications.

Selecting Applicants (Selection Criteria and Process)

Most representatives interviewed felt that the garden suite concept should be open to all seniors, although the suggested eligible age varied. A limited number felt the concept should be broadened to include physically and mentally handicapped persons. Also, in order to ensure control of occupancy and that proper care and service are provided, most respondents felt that a blood relationship between a garden suite occupant and a host should be mandatory. Finally, most representatives felt that in future, the same selection process that is currently in place to gain access to senior's housing should be applied to the garden suite. A screening process by a panel of trained health care and social service professionals should be incorporated into the process.

Land Use and Development Approval Techniques

The land use and development approval methods used varied somewhat between Lethbridge and Parkland. In Lethbridge, the Land Use Bylaw was amended to permit garden suites (defined as those units used in the pilot project), tea parties were held and development permits were approved and issued conditional upon a temporary Alberta Planning Board Order waiving Section 78 of the Planning Act. In Parkland, tea parties were held and development permits were approved and issued conditional upon the ratification of Ministerial Orders declaring, on a temporary basis, the sites to be Innovative Residential Development Areas under Section 149 of the Planning Act. The approach taken in Lethbridge most closely follows normal planning practises.

All representatives interviewed agreed the methods used for obtaining land use and development approval worked well

considering local circumstances. No problems were encountered. The development permit approach, which ensures development control at the local level, was particularly favoured.

The land use and development techniques used in Lethbridge were assessed as being more effective, efficient, applicable and easier to implement than the Parkland approach in that normal planning practices, as prescribed by the Alberta planning system, were followed. Further, the tea party approach used in both locations was assessed by most representatives as being a necessary process for addressing neighbour sensitivity. Although such sensitivity is already built into the planning system, additional measures such as the tea party approach can easily be incorporated into the existing system and can be applied province wide.

Appropriate Controls

Three agreements have been put in place to control the use of garden suites including provincial/municipal agreements (between the province and the participating municipalities), the homeowner's licence agreement (between the homeowners and the province) and the management agreement (between the province and the management bodies - the Lethbridge Housing Authority and the Meridian Foundation). All three agreements are assessed as being effective for controlling the use of garden suites in the pilot project. However, further applicability is dependent upon the delivery methods assumed and the roles of various government and private sector agencies. The homeowner's licence, which in many ways is similar to a lease agreement, was viewed by occupants, host families and agency representatives as having the most potential for future use.

Roles of Agencies and the Manufactured Housing Industry

Representatives of the sponsoring agencies, the manufactured housing industry and other relevant groups were asked to comment on appropriate methods for controlling and delivering garden suites in future and the role that various agencies and private industry would play. All strongly agreed that, for the effective control of occupancy, ownership of the units in future should remain with "someone" other than the occupant or host family. However, two scenarios emerged in terms of actual ownership and the future roles of government agencies and industry in delivering controlling garden suites:

- that garden suites be provided as another form of government subsidized, seniors housing, through the existing seniors program;

- that the private sector take the lead role in the marketing and delivery of garden suites (units would be owned by a private sector rental agency).

8. Appropriateness of the Garden Suite Concept

Appropriateness of the garden suite concept has been assessed on the basis of the following four factors:

- o Demand - The demand for garden suites is not seen as being substantial. Nevertheless, some demand is considered to exist.

- o General Satisfaction - Generally, all occupants, host families, neighbours and appropriate representatives interviewed expressed general satisfaction with the design, construction, servicing, placement and siting of the units.

- Overall Attitude - The overall attitude toward the garden suite concept was very positive.

- Cost - The units were generally considered to be cost effective relative to other forms of senior housing.

Based upon these four factors, the garden suite concept is an appropriate and viable seniors housing option

1.0 INTRODUCTION

1.1 Background

Alberta Municipal Affairs is undertaking a garden suite pilot project as a joint and cooperative effort with the City of Lethbridge and the County of Parkland. In this project, garden suites are self-contained residential units located on the property of a host family to accommodate and facilitate the provision of support services for one or two elderly relatives.

The main objectives and scope of the pilot project are:

1. to design, manufacture/construct, place and operate up to six garden suites, with up to three in Lethbridge and up to three in the County of Parkland;

2. to establish and implement a joint provincial-municipal approval process for locating and controlling the use of the garden suites;

3. to evaluate and recommend on the appropriateness of garden suites as a housing option for the elderly in rural and urban settings and for different income groups, as well as conditions and procedures for implementing this housing option if appropriate; and

4. to remove the units after the conclusion of a three year demonstration and evaluation period as appropriate, or before, if the project must be abandoned for any reason, such as the departure of the occupant(s) of the garden suite(s).

In order to evaluate and recommend on the appropriateness of garden suites as a housing option for the elderly, the following issues have been identified to be monitored and evaluated throughout the course of the project:

1. Demand for garden suites as a form of supportive housing in urban and rural areas;

2. Assessment of care and services provided;

3. Appropriateness of unit design;

4. Appropriateness of unit construction and foundation techniques used;

5. Appropriateness of servicing techniques used;

6. Assessment of placement methods;

7. Appropriateness of siting criteria;

8. Neighbourhood impact;

9. Cost effectiveness of garden suites as a form of supportive housing;

10. Methods for delivery and control of garden suites; and,

11. Appropriateness of garden suite concept.

Final evaluation and recommendations on these issues are expected by March, 1992. However, in order to gain as much insight from the pilot project as early as possible, monitoring and evaluation activities are being carried out in a series of sequential studies. The first of these studies has been completed and has resulted in this preliminary

assessment of the garden suite pilot project. The first study also has produced a separate document describing the project from origin to occupancy. This comprehensive document provides additional background to the preliminary assessment report.

1.2 Preliminary Assessment

This report provides a preliminary assessment of eight of the foregoing issues which could be best addressed on the basis of available data. The eight issues are:

1. Care and services provided;

2. Appropriateness of unit design;

3. Appropriateness of siting criteria;

4. Appropriateness of unit construction and foundation techniques used;

5. Appropriateness of servicing techniques used;

6. Appropriateness of placement methods used;

7. Methods for delivery and control of garden suites; and,

8. Appropriateness of the garden suite concept.

The assessment is primarily based upon the initial attitudes and positions of key individuals and relevant groups with respect to the foregoing issues. The initial attitudes and positions have been assessed in terms of appropriate measures. As well, pertinent comparative data has been obtained and applied as a measure where appropriate. The actual measures

applied are specific to each issue and are described in that context.

The overall approach to obtaining initial attitudes and positions, as well as much of the necessary background/comparative information, was through surveys and interviews. Pre-occupancy and post-occupancy surveys were prepared and administered to all occupants, host families and neighbours. The pre-occupancy surveys were administered to facilitate later assessments and are included in Appendix I. The post-occupancy surveys, included in Appendix II, were administered after an appropriate "settling in" period. Also, individuals and group/agency representatives who were either directly or indirectly involved in the pilot project, or have an interest in housing for seniors', were contacted and interviewed. Once again, the appropriate individuals surveyed and/or interviewed to address each issue are identified in that context. The remaining sections of this report provide a preliminary assessment of the eight issues evaluated using this approach.

2.0 ASSESSMENT OF CARE AND SERVICES PROVIDED

The assessment of the adequacy of care and services provided to the occupants and their impact on the host families is based on the pre-occupancy and post-occupancy surveys and pertains to two units in Lethbridge and two in Parkland.

2.1 Adequacy of Care and Service to Occupants

2.1.1 Occupant Profiles

The five occupants of the four units range from 62 to 85 years of age. One of the units is occupied by a married couple. The husband is the oldest of all the occupants and, because of severe health problems including impaired mobility, requires the most care and service. This is provided by his 64 year old wife. The remaining three occupants (two males and one female) are either widowed or divorced, reasonably healthy and able to care for themselves. Nevertheless, all occupants, including the couple, require assistance with heavy cleaning.

All occupants share a very close relationship with their families. In every case, the occupant formerly resided with an immediate family member. Two resided with the host family in the host dwelling. The major services and care provided to the occupants under these former living arrangements by the host family and other family caregivers were emotional support and security. For the couple and female occupant who do not drive, transportation and accompaniment to medical appointments and on shopping and/or social expeditions also were important services. None of the occupants rely on external agency care.

2.1.2 Initial Expectations

All occupants expected the care and service provided by the host family and other family members to either remain the same or improve with the garden suite move. All rely exclusively on the immediate family for these services, once again demonstrating the closeness of these family units. For those occupants who formerly resided with the host family, service and care were expected to remain unchanged. For those who resided with other family members, care and service needs were expected to be better met because of the proximity to the principal caregiver and other close family members.

In all instances, the occupants expected their overall quality of life to improve in the garden suites. They could remain proximate to their principal caregiver and host family, yet be physically removed from the family. All expressed a strong desire for "a place of their own" where they did not feel they were intruding or "underfoot". Separate living quarters were expected to provide more privacy, independence and freedom to pursue personal lifestyle preferences. At the same time, the security and emotional support required by all occupants could be maintained because of the proximity afforded by the garden suite living arrangements.

All occupants indicated that the major service they expected to provide the host family was to "keep an eye on things", particularly during the day when many host family members are absent from home. Providing assistance with outdoor maintenance, babysitting and meal preparation also were noted as services which would be provided. Most of these services were already being provided under the former living arrangements.

2.1.3 Care and Service Provided

All occupants reported that the quality of care and service provided by the host family since moving into the garden suite either remains unchanged or has improved as a result of closer proximity. Their care and service needs are being met. All occupants also stated that their overall quality of life has improved significantly. The improvement is directly related to the proximity of the suites and being physically removed from the host dwelling. The occupants continue to benefit from the care and support available as a result of the close proximity, but do not feel they are "intruding or are underfoot". They feel considerably more independent, can entertain family and friends, and can maintain their own lifestyle. As one occupant stated, "I can eat when I want to eat and sleep when I want to sleep". Another comment which aptly describes the improved well being of all occupants was as follows: "It (the garden suite arrangement) lets grandpa be grandpa once again."

In all cases, the relationships with the host families either remained unchanged or improved after moving into the suite. The only reasons stated for potentially moving were ill health or if the host family had to sell their home.

2.2 The Impact of Care and Service Requirements on the Host Families and an Assessment of Services Received

2.2.1 Host Family Profiles

In all four cases, the blood relationship between the occupant and host family is that of parent(s) and daughter. All daughters are married and living with their spouses. With one exception, the host families have two to three children living at home and range in age from ten to sixteen years. The daughter with no children at home has one married daughter

with a young child. These families live across the street from one another. With one exception, both the husband and wife work during the day so that the occupants are on their own.

2.2.2 Care and Services Provided

The care and service provided in all four cases is as stated by the occupants. No additional care and service requirements were noted as a result of the garden suite living arrangement which were not previously anticipated. Care and service, primarily in the form of emotional support, companionship and transportation, was reported as easy, if not easier, to provide than under the former living arrangements.

2.2.3 Impact on Families

In all cases, the impact on the host families of providing care and service requirements in the garden suites has been positive. All daughters stated a close and warm relationship with their parent which they are able to maintain to an extent. Three of the four qualified this statement and felt they "didn't see enough of the occupant". They did not feel comfortable intruding on their (the occupant's) private space, namely the garden suite unit. These daughters, however, also stated that they were formerly accustomed to constant interaction with their parents and that, basically, the relationship has not changed.

In those cases where the occupants formerly lived with the host families, the male spouses all recognized and supported the closeness of the family unit, but reported some conflicts related to lack of privacy, different lifestyles and lack of space. All these concerns were recognized and echoed by the daughters. All have been eliminated by the garden suite living arrangements. As such, the quality of life has

generally improved for all the host families. It is interesting to note that improved relations between the occupant and grandchildren was noted by three of the occupants, as well as by the host families.

Any stress resulting from distance, concern over the parents future, safety and emotional well being of the parent has been eliminated by the new garden suite arrangements. Stress relating to misconceived perceptions on the part of the parents, that they were in the way, also has been eliminated.

According to the host families, the only eventualities which would cause the occupants to move would be ill health, or if the family had to sell their property.

2.2.4 Assessment of Services Received

The services received by the host families correspond to those cited by the occupants. Three families felt that the services the occupants provide exceed expectations. For those families where both husband and wife work, "keeping an eye on things" during the day was noted as the most important service provided. Emotional support and companionship provided to the occupant was felt to be reciprocated in all four cases, particularly from the perspective of the daughters and grandchildren. The daughters all stated that they enjoyed their parent's company and "liked having them around".

2.3 The Financial Value of Care and Services Provided

Estimates of the value of care and services provided in the garden suite pilot project relative to costs of other comparable programs are difficult to provide in that all occupants are basically self sufficient. No programs are being replaced. However, if needed, the occupants all have access to certain community support programs available to most

seniors province wide. These services include coordinated home help and meals on wheels, and, theoretically could be replaced or provided by the host family.

Coordinated home care includes nursing care, physiotherapy, home health aid support and/or homemaker service. The cost of coordinated home care per client varies across the province. For example, in Lethbridge, the average daily cost is $6.00 while in Parkland the cost is $4.50 (the Parkland figure is inclusive of meals on wheels). The average cost per client province wide is $4.50 per day. The cost of meals on wheels service is based upon the client's ability to pay and varies by community. In Lethbridge, for example, the cost to the client varies between $0.50 and $4.50 per day.

Based on average home care costs of $4.50 per day and the same amount for meals on wheels, home care services in the garden suite, or any other self contained unit, would cost about $9.00 per day, or $270 per month (inclusive of meals on wheels). Theoretically, therefore, assuming the host family was able to replace all community support services available to an occupant, a monthly saving of $270 to $326 could be realized. For most seniors, some or all of the cost of coordinated home care is subsidized by the provincial government. Assuming an average subsidy of $4.50 per day or $135 per month, the services and care provided through the garden suite concept could result in a cost savings of $135 per unit per month for coordinated home care. In most communities, meals on wheels is only partially subsidized, if at all. Where subsidy is provided, it is usually a local community cost.

Although rental payments are not a direct service and care cost, they constitute an indicator of the perceived value of the garden suite lifestyle. In the case of each occupant, the current rents of $400 per month, plus an average of

approximately $35 per month for utilities, are not heavily subsidized and exceed the amount they would have had to pay in government subsidized seniors housing (25 percent of the occupants' income) even when assistance of the Senior Citizens Renter Assistance Program is taken into account. Had the occupants paid rent and utilities in a government subsidized housing project, they would have realized a cost saving of between $36 to $146 per month. Also, in most instances, the occupants reported that the cost of living in the garden suite, on the basis of rent alone, exceeds the total cost of their former living arrangement, inclusive of room and board. Yet in all instances, neither the occupants nor the host families considered the cost of living in the garden suite to be too excessive in light of the benefits of living in the units. In other words the cost was warranted. Of particular value was the security afforded the occupants, resulting from the proximity of the unit to the host family, combined with the privacy and own living space features of the unit. Rents and subsidy savings are discussed further in Section 9.0.

3.0 APPROPRIATENESS OF UNIT DESIGN

The design and layout of the garden suite units are shown in Figures 1, 2 and 3. Figures 1 and 2 show the front, rear and side exterior unit elevations and outline design specifications while the layout of the interior is shown in Figure 3.

3.1 User Satisfaction

The pre-occupancy and post-occupancy surveys administered to the garden suite occupants provide the primary measure for determining user satisfaction with the liveability and aesthetic features of the unit. Expectations with respect to liveability and general design features were determined through the pre-occupancy surveys. These were used for comparison purposes.

The results of the comparative approach are provided below in terms of user satisfaction with interior and exterior unit features, accessibility of the unit, overall comfort level, and suggestions for improvement. It is important to note that the post-occupancy surveys were undertaken as late as possible in the study time frame to provide the occupants a "settling in" period and to become accustomed to, and familiar with, their units. Their comments, therefore, are considered realistic and valid.

3.1.1 General Unit Features

1. Size

Expectations: Three of the four occupants felt that the size of the units (50 square meters or 550 square feet) should be adequate. The occupants (couple) of one unit

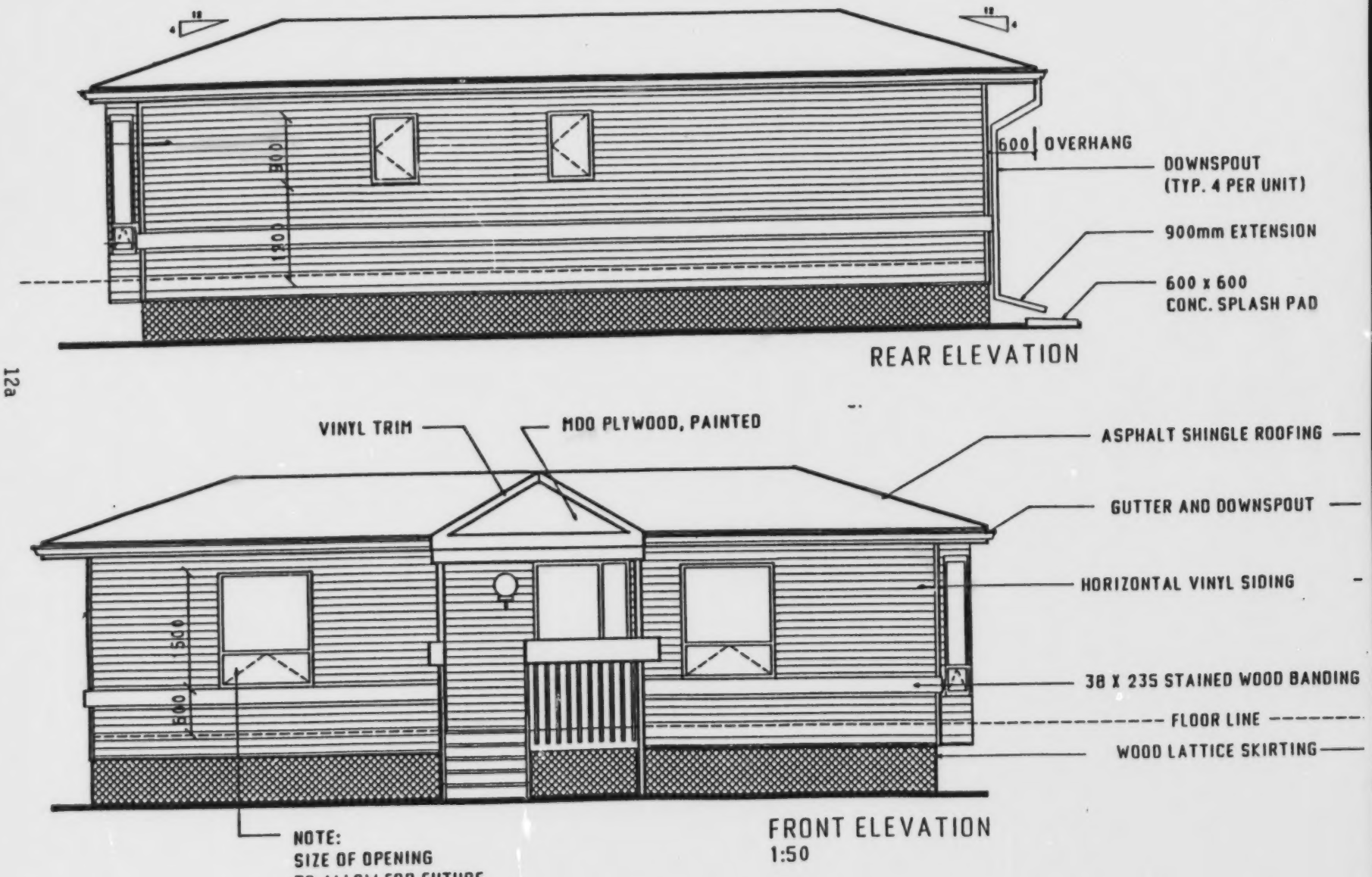
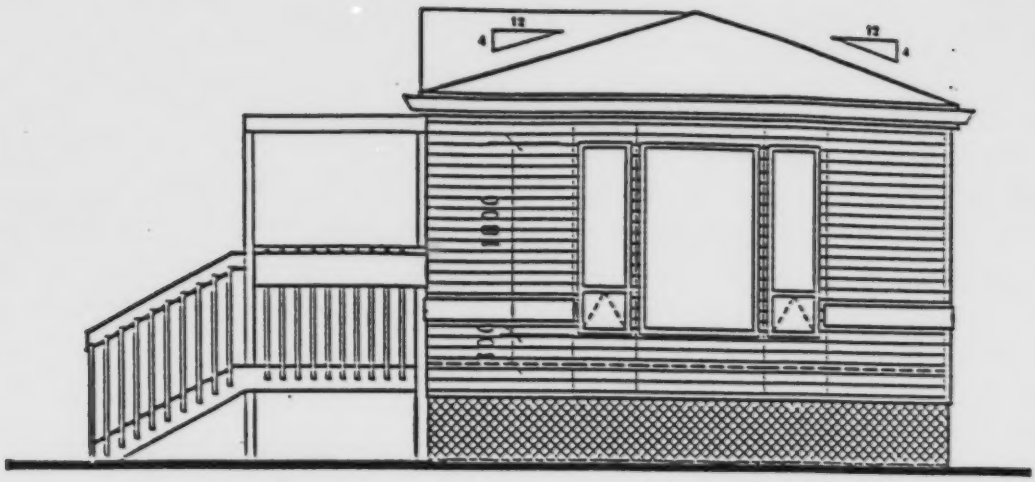
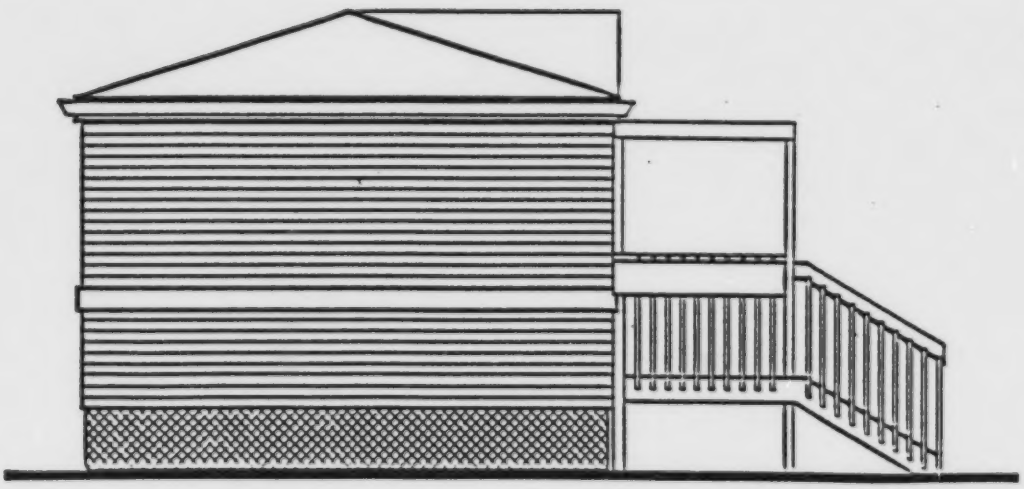


FIGURE 1: FRONT AND REAR UNIT ELEVATIONS

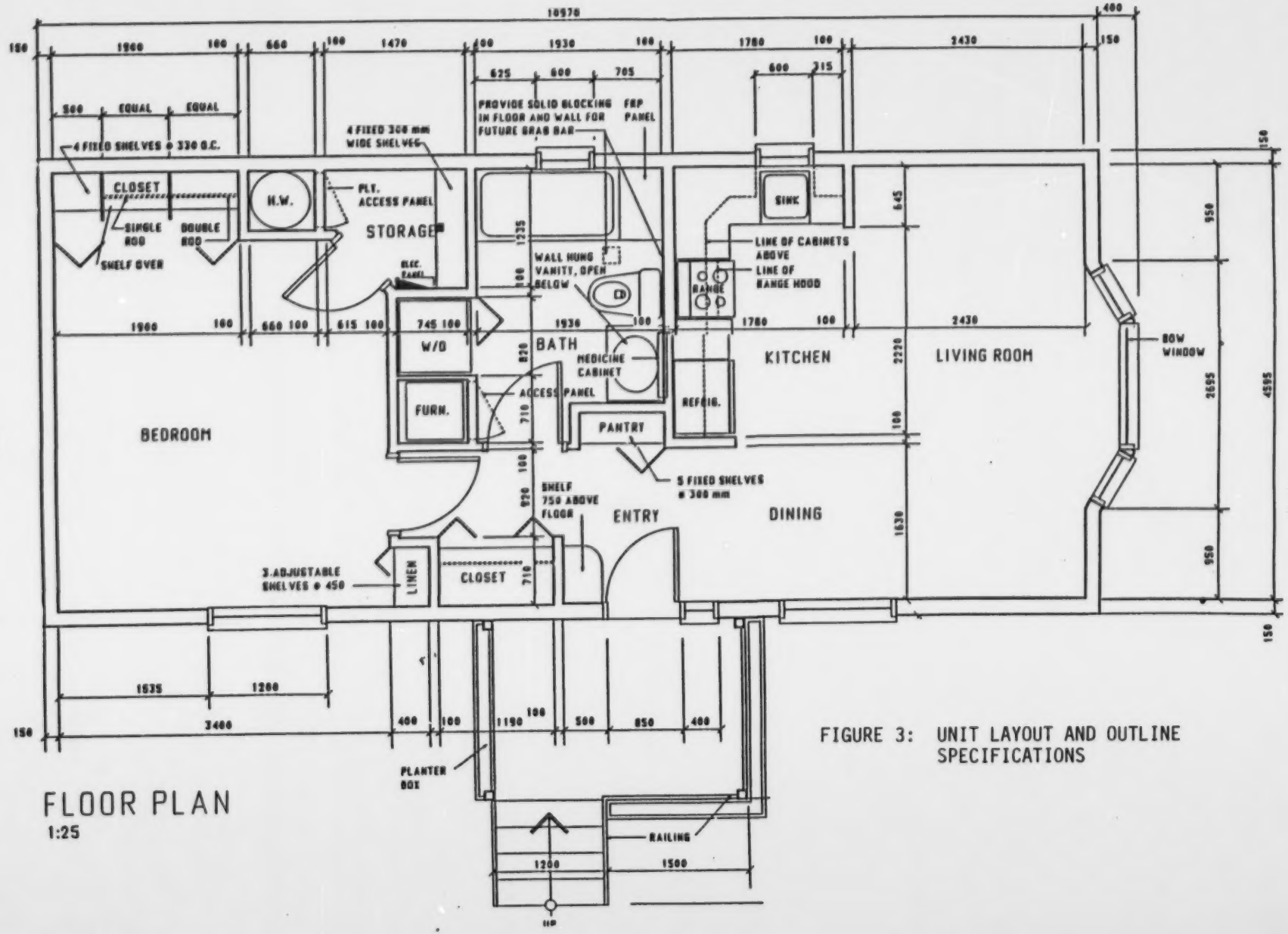


RIGHT ELEVATION
1:50



LEFT ELEVATION

FIGURE 2: RIGHT AND LEFT UNIT ELEVATIONS.



FLOOR PLAN
1:25

FIGURE 3: UNIT LAYOUT AND OUTLINE SPECIFICATIONS

expressed concern stating that the unit may be too small to allow visiting. The couple has a very large family and visiting with the family is their only social activity.

Actual Assessment: Two of the four occupants were pleased with the size of the unit stating it was "just what they needed" and expected. One occupant rated the size as adequate for his needs, "but just a little small". Nevertheless, he felt it was better than expected. The couple occupying one of the Lethbridge units considered the living/dining room area to be too small and cramped. The male occupant in particular experienced some difficulty maneuvering with his walker between the entrance and the living room area. Otherwise, the size met expectations - particularly in regard to the bedroom and bathroom.

2. **Layout**

Expectations: All were positive with respect to what they knew of the unit layout (see Figure 3). Generally, the layout was well "liked". Expectations were high.

Actual Assessment: The layout met the positive expectations of all the occupants. This feature was particularly liked by all.

3. **Furnishability**

Expectations: All indicated they expected the furnishability to be adequate but three expressed reservations and felt that some furniture may have to be given away.

Actual Assessment: Three of the four occupants rated the furnishability of the unit as good. Some furniture could

not be accommodated, but all three were able to adequately furnish the unit to their needs. The couple expressed concern with respect to the furnishability stating there was not enough room to accommodate the large stuffed armchair the husband sleeps in.

4. **Privacy**

Expectations: All expressed high expectations with respect to privacy.

Actual Assessment: All occupants were very pleased with the privacy afforded by the unit. The couple noted that the unit design allowed them "to see what was going on outside without feeling they were in a fish bowl".

5. **Unit Feature: Security**

Expectations: All occupants expected to feel secure in the units, particularly those in Parkland as a result of the dead bolts provided by the manufacturer of these units.[1]

Actual Assessment: All favorable expectations with respect to security were met. However, one occupant in Lethbridge noted that while a dead bolt would have alleviated her initial security concerns, they were met once she discovered a lock on the storm door. Another occupant noted that only one entrance made him feel particularly secure.

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[1] *Minor variations in the construction practices between the two manufacturers, as they related to detailed finishing features, were respected by the tender and construction process. Consequently, the Parkland units were provided with dead bolts but no storm doors. In Lethbridge, storm doors were provided in lieu of dead bolts. Storm doors have now been provided for the Parkland units.*

3.1.2 Interior Design Features

The occupants were asked if they were pleased with certain specified interior design features and amenities. The features, and the responses, are as follows:

1. **General Decor:** All occupants were pleased with this feature, one extremely so (in Lethbridge).

2. **Wall Finishes:** The vinyl wall paper pleased all occupants. One noted that it was easy to wash and keep clean.

3. **Floor Finishes:** All occupants expressed general satisfaction with the carpet and linoleum floor finishes. One occupant, however, suggested that the linoleum used in the entrance/hallway area and kitchen was cold and runners were required. Another indicated that the carpeting/linoleum mixture in the dining room/entrance/kitchen interface area did "not make much sense".

4. **Location of Entrance:** The entrance location was considered ideal by all.

5. **Number of Entrances:** The one entrance was considered appropriate. A second was not considered necessary. As was noted previously, one occupant stated that one entrance made the unit feel more secure.

6. **Location of Windows:** The location of the five windows as shown by Figures 1 and 2 pleased all occupants.

7. **Type of Windows:** All occupants were particularly pleased with the type of windows used for the units. The screens, general aesthetics and low level of the opening lever were

noted as being particularly appealing. The bay window was considered attractive but some noted problems with respect to furnishability.

8. **Number of Windows:** All occupants responded favorably. One stated there were just enough and three expressed extreme satisfaction with the amount of natural light in units.

9. **Lighting:** The number and location of lighting fixtures pleased all the occupants although one occupant did provide the following two suggestions:

   - add a wall fixture on the living room side of the kitchen/living room partition;

   - provide a "two way" switch for the hall light so that it can be switched off once the occupant is in the bedroom (prevents backtracking).

10. **Storage Space:** The storage space provided was considered adequate by the occupants of three of the four units. The couple expressed concern about lack of adequate space for storage. Much of their storage closet is taken up by an apartment sized freezer.

11. **Safety and Other Related Features:** None of the units contained any special safety features at the time of the interview. However, all units have been constructed to allow for the installation of such features as required. The Lethbridge couple will be installing grab bars in the tub area and hand rails in the hallway. Both the bars and the rails will be provided through the Home Care Program. The couple also have a Lifeline System. One occupant has installed a portable plastic grab bar on the tub and finds

it works well. Some comments provided with respect to safety features include:

- intercoms are needed;

- dead bolts are needed (Lethbridge only);

- the emergency switch for the furnace above the entrance is too high to reach in an emergency.

Separate telephone lines were an option to the intercom which was available but rejected by the occupants.

12. **Kitchen:** The occupants generally found the kitchen convenient to use. One occupant thought that kitchen cupboard space was insufficient. The occupant, however, is an avid baker and considers this a hobby. A second occupant uses the kitchen on a very limited basis since all major meals are shared with the host family. A third occupant suggested that there is not sufficient counter space for a microwave oven and that this caused some inconvenience. The Lethbridge occupants found suitable locations for their microwaves in the living/dining room areas and did not consider this to be an inconvenience.

13. **Appliances:** All occupants found the appliances very convenient to use and were particularly pleased with the refrigerator units. One occupant found the stove to be a little "high tech" but he became accustomed to it. All occupants were extremely pleased with their washer and dryer units.

14. **Bathroom:** Again, the occupants in general found the bathroom easy to use and spacious. One occupant found the bathtub to be somewhat small but noted she had no trouble using it and had been accustomed to a completely different

form of bathtub most of her life. A second occupant felt the medicine chest was too small to accommodate his personal effects. A third occupant found the bathroom easy to use, but was concerned about the poor quality of "grouting" around the bathtub (Parkland).

3.1.3 Unit Accessibility

The occupants were asked to rate how accessible they found the unit (how easy it is to enter and move about the unit). The rating choices included very accessible, quite accessible and not very accessible.

Three of the four occupants rated the unit to be very accessible. However, the Lethbridge couple rated it as being not very accessible but only in the entrance/dining/living room area. This is consistent with comments made related to unit layout.

3.1.4 Overall Comfort

The occupants were asked how comfortable their units were overall. Five ratings choices were provided including very comfortable, quite comfortable, somewhat comfortable, not very comfortable and not at all comfortable. In three of the four cases, the unit was rated as being quite comfortable overall. The fourth occupant rated it as very comfortable.

3.1.5 Exterior Appearance and Design Features

All occupants were pleased with the exterior appearance of the units. They are considered to be aesthetically pleasing and "look better" than anticipated. The occupants did not think they resembled typical mobile home units and had a "nice cozy cottage look" about them. The porch was noted by all to be a

particularly desirable feature. The Parkland occupants were pleased with the planters as well.

3.1.6 Suggested Changes

The occupants were asked what, if anything, they would change about the interior of the unit. The following specific suggestions were made:

- more soundproofing is needed to block out highway traffic noise;

- size of the entrance/kitchen/living/dining areas should be increased;

- a storm door would be a "nice" feature, particularly in summer.

The storm door was noted in concert with a problem reported by both occupants related to improper weather stripping around the front door entrance. Snow was blowing into both units and it was extremely cold. The problem was rectified but it was noted that a storm door would have "come in handy". As was noted previously, storm doors have now been provided for the Parkland units.

3.1.7 Concluding Remarks

1. The initial expectations of all occupants as they related to general unit features were generally high. Only limited reservations were expressed. The garden suites met or surpassed all expectations in regard to all features excepting size and furnishability. Concern in regard to these features, however, was not a major concern for most, with one exception. It is interesting and potentially significant to note that the exception was a

couple and not a single occupant. Furthermore, the husband member of the couple uses a walker and a wheelchair because his mobility is impaired. Size, therefore, is of particular concern. Finally, the couple frequently entertains family members and initially did express concern about "room for visitors". Regardless, this couple, along with the remaining three occupants, unequivocally stated that the garden suite measured up to, and exceeded, their initial expectations.

2. In general, the occupants were pleased with the specific interior design features of the unit. Particular pleasure was expressed with respect to the general decor and window features. Unit amenities were considered to be convenient and easy to use. Only minor concerns and suggestions were expressed with respect to floor finishes and lighting. The only significant comments relate to inadequate storage, cupboard and counter space.

3. The occupants all rated the unit to be very accessible with one exception. Once again, the exception relates to the unit which accommodates two persons, one of whom relies on a walker and wheelchair for functional mobility.

4. Overall, the units were considered to be comfortable.

5. The exterior appearance of the unit and, in particular the porch, met with the unqualified approval of all occupants.

3.2 Host Family Satisfaction

As part of the post occupancy survey process, host families were asked questions related to exterior unit aesthetics or appearance and interior design and layout. The responses are described below and serve as a measure for assessing satisfaction with the unit.

3.2.1 Exterior Appearance

All host family respondents were generally pleased with the exterior appearance of the units. The Lethbridge families were particularly pleased with the vinyl siding. One such family intends to replace the siding of the host dwelling to match that of the garden suite. The only suggested improvement was provided by the Parkland families. Both families remarked on the back side wall of the unit which was considered to look stark and unattractive relative to the rest of the unit. This wall was the only feature which made the unit "look like a trailer". It was suggested that the look of the wall be softened by adding window shutters. Conversely, it also was noted by these same families that the limited number and size of the windows on that wall made the unit more private.

3.2.2 Interior Design and Layout

Again, all host family respondents were pleased with the interior design and layout of the units. The units were considered to be "bright and colourful" with a layout which "flows well". Also, the units were considered to display "quality" rather than "cheap features". Nevertheless, the following specific suggestions were offered:

- extend the porch another two to three feet to make it more useable (up to bedroom window);

- the refrigerator could be smaller and the stove less elaborate so that other features required by the elderly, such as a cushioned bathtub, could be provided[2];

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[2] *This comment was offered by the family whose parent shares all their meals with them.*

- offer some alternative cupboard space or a larger medicine chest since no cupboard space is provided under the sink in the bathroom;

- increase the size of the entrance/dining area.

3.2.3 Concluding Remarks

In general, all host families were very pleased with both the exterior appearance and interior design of the units. Only one family indicated that the unit still looked like a trailer from one aspect. Nevertheless, the same family stated that they were very pleased with the appearance of the unit. Some of the suggestions for improvement are valid, do not require a major cost increase, and should be considered in redesigning future garden suite units.

3.3 Neighbour Satisfaction

As part of the post-occupancy telephone survey process, neighbours were asked questions aimed at assessing their attitudes with respect to unit aesthetics and compatibility.

3.3.1 Exterior Appearance and Compatibility

With one exception, all respondents were pleased with the exterior appearance of the units and considered the units to be compatible with the neighbourhood. The positive initial opinion of the garden suite units expressed by all neighbours in the pre-occupancy survey remained basically unchanged by unit placement. Two neighbours in Lethbridge reported that they felt even more positive about it than before.

Only one respondent in Lethbridge was not particularly pleased with the unit's appearance indicating that it was "too utilitarian". As such, the respondent did not feel the unit

to be compatible. Nevertheless, this respondent indicated, along with all remaining respondents, that the potential existence of more such units in the neighbourhood would not be of concern. It was noted by two respondents that large pie shaped lots were most suitable for accommodating such units.

The favorable comments related to the exterior appearance and compatibility of the units are further substantiated by the respondents' interest in the garden suite concept as a future housing option to meet their own family needs. Four respondents indicated they would definitely consider the concept, three were not sure and two stated that the concept would not be suitable for their families, but consider it a good concept where it "fits". Interestingly enough, the neighbour who rated the appearance as only fair is also very interested in the concept for his own mother.

3.3.2 Concluding Remarks

On the whole, the neighbour responses indicate that the appearance of the unit is pleasing and compatible with the neighbourhood. Only one neighbour was not particularly pleased with the look of the unit, yet this same neighbour was not concerned about more such units being located in his neighbourhood and, in fact, expressed considerable interest in accommodating his mother in a garden suite unit.

3.4 Industry Satisfaction

The manufacturers of the garden suite units, as well as the Executive Director of the Alberta/Saskatchewan Manufactured Housing Association and the architect were interviewed to assess unit design, aesthetics and compatibility, and to identify suggested improvements.

3.4.1 Exterior Appearance

Generally, the exterior appearance and compatibility of the unit were rated as good. However, it was suggested by one respondent, that more innovation could have resulted in an outstanding unit, particularly as it relates to the roof line (for example, gable ends could have been used on the sides). Also a recessed or inset entrance could have been considered along with a lower "break strip to make the unit look lower" and more in scale to the surrounding homes. The respondent was concerned that the units still looked "a little like trailers" and stressed several times that more industry innovation is needed to increase compatibility.

The "break strip" was considered a nuisance by one manufacturer and far too costly. A strip of maintenance free coloured vinyl would create the same effect at far less cost. Alternatively, since the clear cedar required painting, brown vinyl moulding over spruce trim could be considered. This would provide a cost efficient and maintenance free alternative. The cedar moulding was reported to cost $1,600 for two units and resulted in 16 man hours of labour to install and properly finish.

Two other suggestions were provided by the manufacturer:

- that a vinyl porch roof be considered instead of wood for improved aesthetics;

- that since the three inch side overhangs are totally ineffective visually, they be eliminated and the space be used instead to increase interior floor space by six inches.

3.4.2 Interior Design

All those interviewed agreed that the design of the interior is basically good given the size specifications. Some specific comments which were made relating to the accessibility/useability, size, cost and safety features of the unit are important for future consideration and are listed below:

- The rooms are "tight" for wheelchair use, particularly in terms of proper maneuvering or turning radius. If the units are to be fully wheelchair accessible, consideration to the height of all cabinets, counter tops and appliances is needed. The present units are designed to be only partially suited to wheelchair occupancy.

- The bay windows are attractive but very expensive and result in two feet of wasted space. Considering how "tight" the units are in terms of space, a latticed picture window could be used instead of the bay window. This would still result in a cottage look but provide extra living space.

- The sidelight door is very expensive and may not be necessary.

- Industrial strength linoleum flooring is not needed.

- To ensure proper safety, the bedroom window should be replaced by a cafe door and the porch extended accordingly.

- The units should be "slightly" larger to allow for more storage space, but only "slightly". An extra five feet in length is too long to fit most urban lots.

- In retrospect, a reversed plan unit should have been available so that the location and exposure of the living room could be changed as needed.

3.4.3 Concluding Remarks

Although the unit aesthetics and design are considered to be good by all those interviewed, serious consideration should be given to some of the suggestions, especially to those which pertain to spatial features of the unit.

3.5 Other Comments

As part of the interview process, all working committee members were asked to comment on the unit aesthetics and design. General satisfaction with the end result was expressed. Specific relevant comments and/or suggestions put forth are as follows:

- The unit design is "better" than any existing alternate forms of seniors accommodation.

- More thought is needed to further eliminate the trailer look of the units.

- The "cute" cottage-like appearance is appropriate to seniors and to address neighbourhood sensitivity.

- A second entrance is needed for safety reasons.

- A vestibule between the living/dining room and the front entrance may be appropriate.

- Two bedroom units should be considered to accommodate senior couples. Privacy is particularly crucial to many such couples.

- The bay window is visually appealing but the space consumed could be better applied to interior floor space.

4.0 APPROPRIATENESS OF SITING CRITERIA

The initial attitudes and positions of the occupants, host families and neighbours toward the siting criteria applied in the pilot project were determined through surveys. Telephone interviews were used to determine the attitudes and positions of relevant municipal officials. The siting criteria varied between Lethbridge and Parkland in recognition of the different requirements and standards which apply in urban versus rural locations. Actual site plans are shown by Figures 4 through 7. The two Lethbridge sites are represented by Figures 4 and 5 and Figures 6 and 7 relate to the Parkland sites.

4.1 Lethbridge

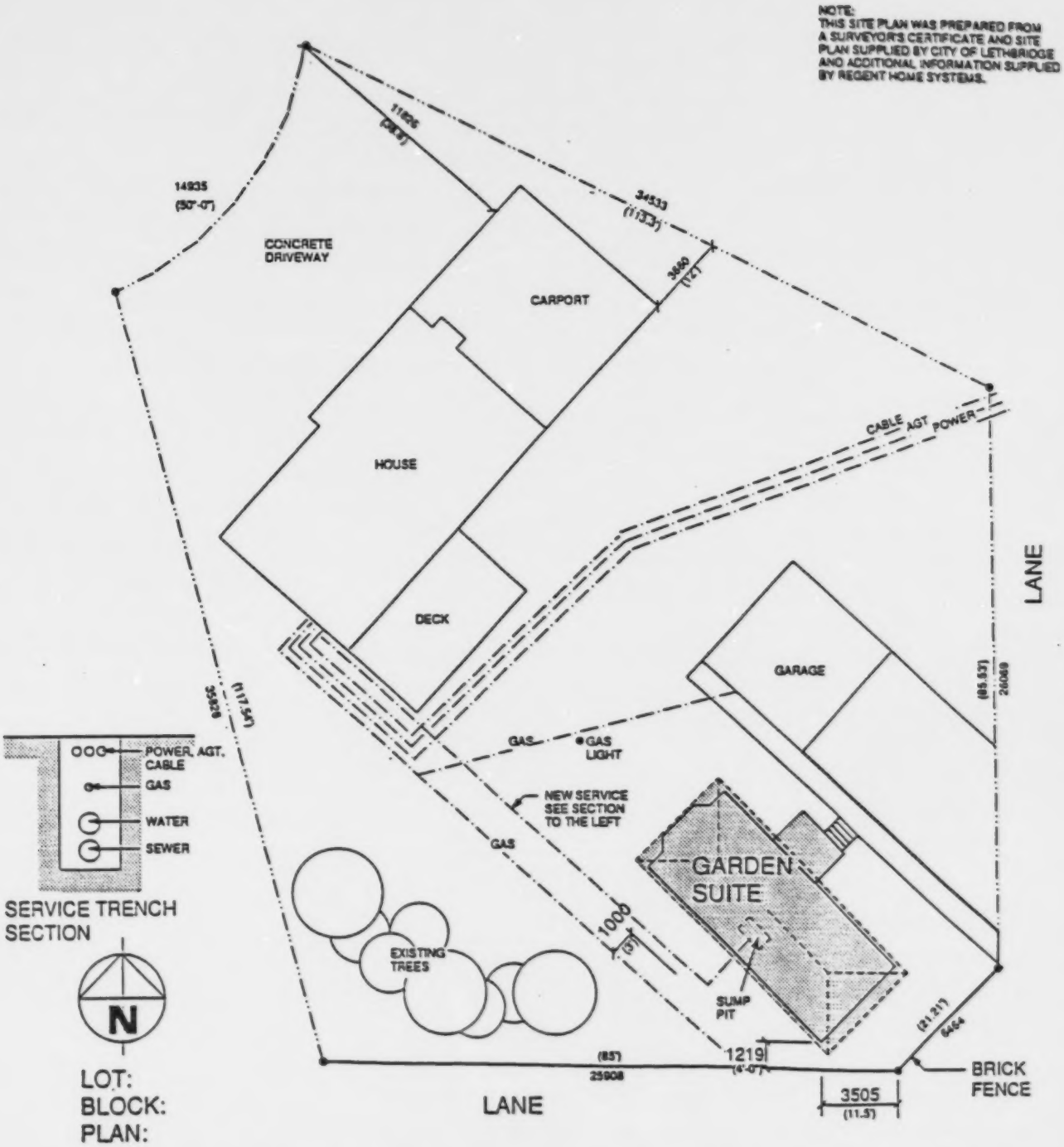
4.1.1 Occupants

Both occupants rated the siting aspects of the units as excellent, particularly in terms of the location as it relates to the host dwelling.

4.1.2 Host Families

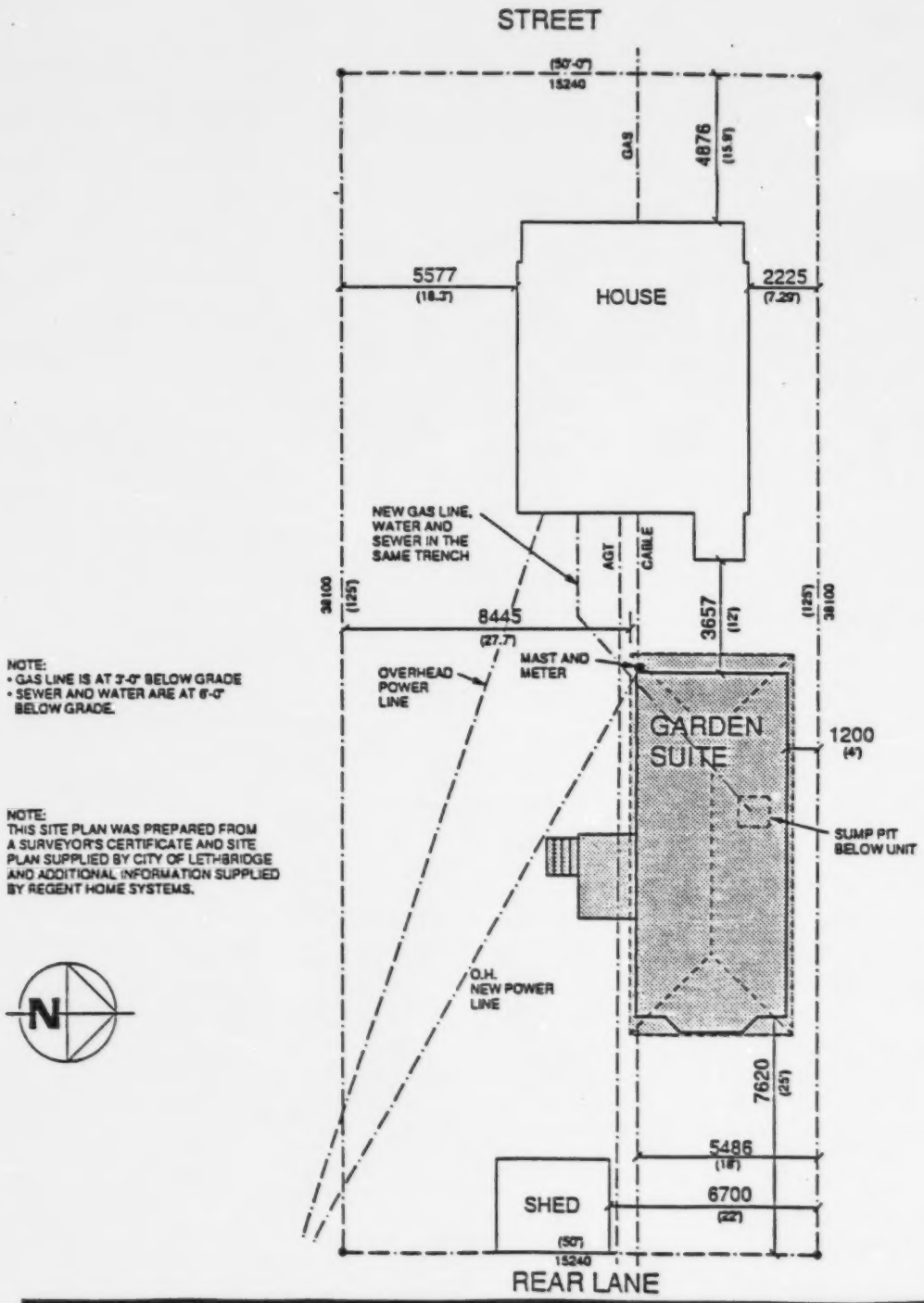
Both families were very pleased with the siting aspects of the units. One family noted that the orientation was ideal in that the occupant could look onto the street from the unit, rather than into "someone else's windows". Neither family reported any impact on the use of amenity space or enjoyment of the yard although it was noted that the yards were used primarily in summer and "things may change". However, this was not considered likely.

Both families felt they had meaningful input into the siting of the units. One family had requested that the unit be sited



DETAIL NAME	SCALE	DETAIL NUMBER
SITE PLAN	1:250	
PROJECT NAME	DATE	
GARDEN SUITE PILOT PROJECT (LETHBRIDGE)	JAN. 03, 1990	

FIGURE 4: SITE PLAN - LETHBRIDGE



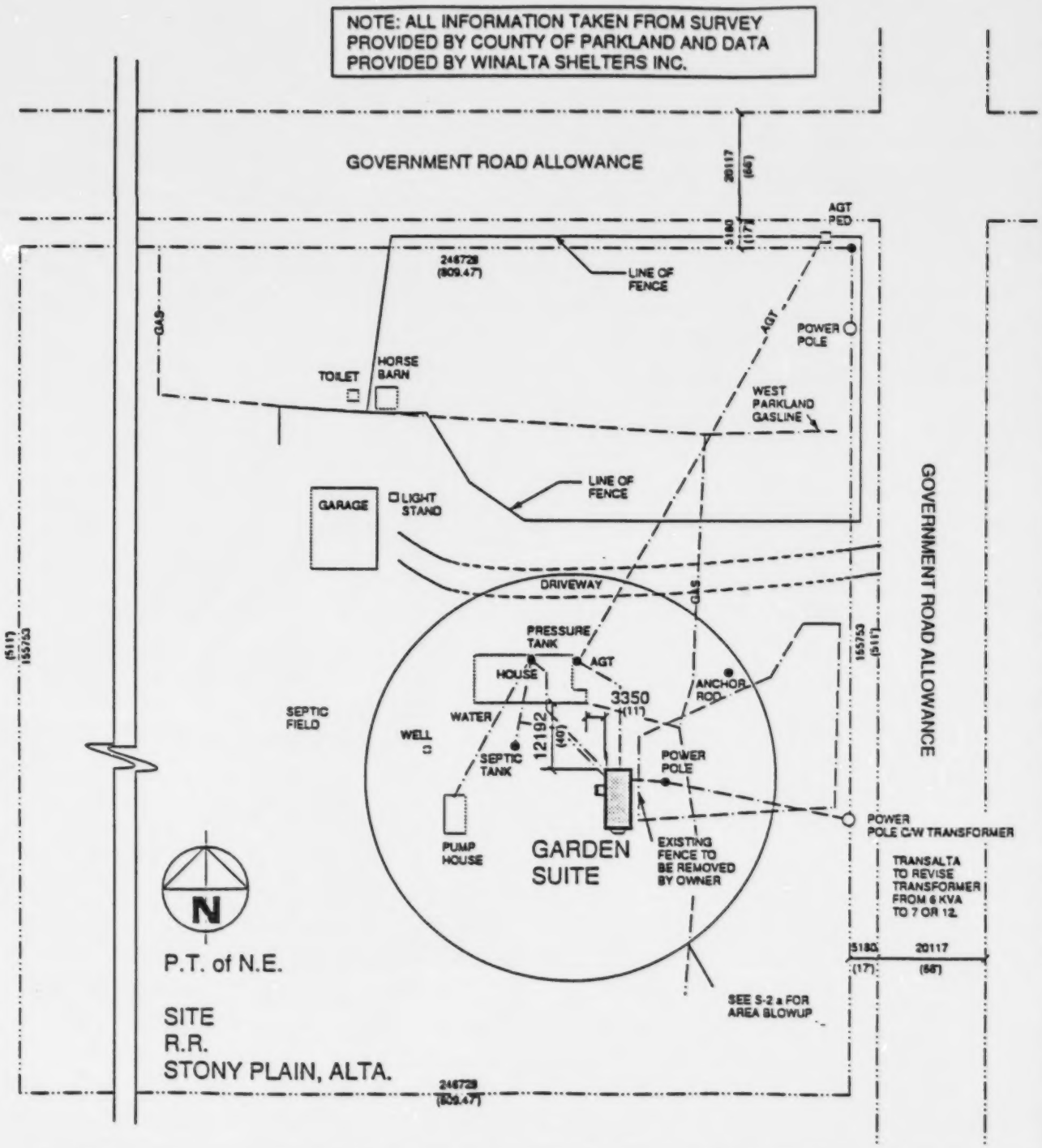
NOTE:
- GAS LINE IS AT 3'-0" BELOW GRADE
- SEWER AND WATER ARE AT 6'-0" BELOW GRADE.

NOTE:
THIS SITE PLAN WAS PREPARED FROM A SURVEYOR'S CERTIFICATE AND SITE PLAN SUPPLIED BY CITY OF LETHBRIDGE AND ADDITIONAL INFORMATION SUPPLIED BY REGENT HOME SYSTEMS.

DETAIL NAME	SCALE	DETAIL NUMBER
	1:200	

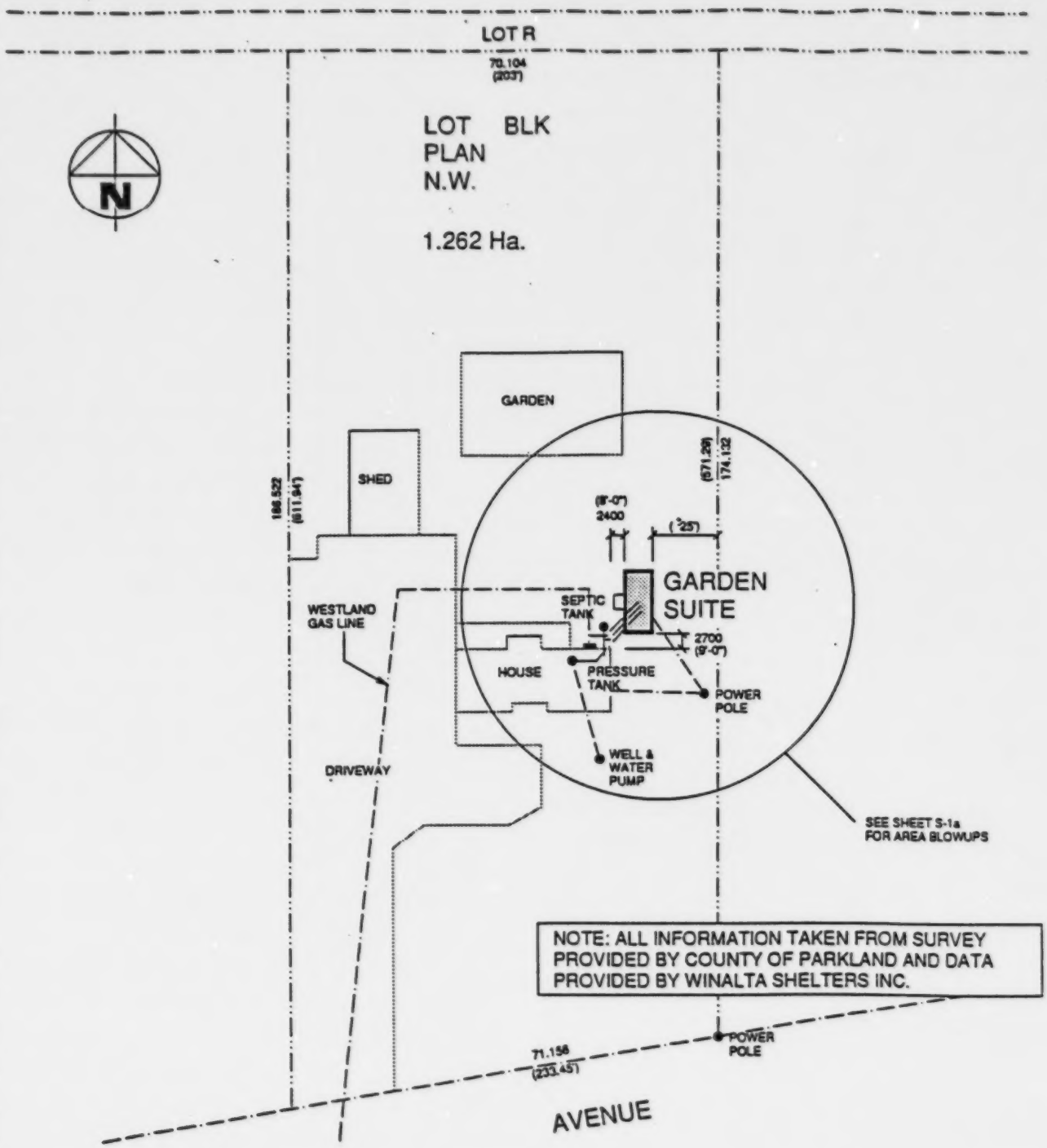
PROJECT NAME	DATE
GARDEN SUITE PILOT PROJECT (LETHBRIDGE)	JAN. 03, 1990

FIGURE 5: SITE PLAN - LETHBRIDGE



DETAIL NAME	SCALE	DETAIL NUMBER
SITE PLAN -	1:1000	
PROJECT NAME	DATE	
GARDEN SUITE PILOT PROJECT (PARKLAND)	JAN. 03, 1990	

FIGURE 6: SITE PLAN, PARKLAND



DETAIL NAME	SCALE	DETAIL NUMBER
SITE PLAN	1:1000	
PROJECT NAME	DATE	
GARDEN SUITE PILOT PROJECT (PARKLAND)	JAN. 03, 1990	

FIGURE 7: SITE PLAN - PARKLAND UNIT

differently - towards the back of the property - so that the yard amenity area was not broken up. This was done to everyone's satisfaction.

4.1.3 Neighbours

All Lethbridge neighbours indicated that the placement of the garden suite units did not in any way affect the use and enjoyment of their property, nor were their views affected. One neighbour indicated that he can not even see it (the unit) from his home.

4.1.4 Municipal Officials

The municipal officials contacted considered both units to be appropriately sited. The criteria as specified by the Land Use Bylaw have been applied.

4.1.5 Concluding Remarks

The units appear to be appropriately sited. Both the occupants and host families are extremely pleased. However, the impact on amenity space cannot be tested effectively until after the summer season when yards are used most extensively.

The neighbours felt they were not impacted by the siting of the units. Again, however, this should be tested at the end of the summer season. Nevertheless, it can be concluded, on a preliminary basis, that the Land Use Bylaw siting criteria applied to the units are appropriate. The two Lethbridge lots, one large and one relatively small, provide a good test of these criteria.

4.2 Parkland

4.2.1 Occupants

Both occupants were generally satisfied with the siting of the units stating that they were located "just the right distance from the main house".

4.2.2 Host Families

One of the two families said they were pleased with the way the unit was sited and would change nothing. They felt they had been given ample opportunity to provide meaningful input into the siting of the unit. The second family indicated that although they were satisfied with the unit siting, they would have preferred that it be located a little further from the host dwelling. In fact, the unit was moved as much as was feasible and at an additional cost. Also, it should be noted that the occupant of this unit stated that it was located "just the right distance from the main house".

Neither family has, or expects to have, the use or enjoyment of their yard space affected by the units because of the size of properties. Similarly, although both occupants own vehicles, parking is not a problem.

4.2.3 Neighbours

In terms of the use and enjoyment of their properties, the responses provided in Parkland are similar to those in Lethbridge. The units have little if any impact on the neighbours. The neighbours contacted in the case of the more rural area cannot see the unit and considered the questioning process to be totally irrelevant.

An immediate neighbour in the semi-rural (country residential) situation indicated that they could see the unit, but only from their kitchen window and that their view was marginally affected as a result. Moving the unit further away, to the other side of the host dwelling, would eliminate this impact but it was not considered necessary.

4.2.4 Municipal Officials

The municipal officials contacted considered both units to be appropriately sited and could foresee no future site related impacts occurring because of their semi-rural and rural locations. Siting is not considered as critical an issue as in urban areas.

4.2.5 Concluding Remarks

The comments pertaining to the relevance of site aspects in relation to the unit located in the rural setting suggest that siting considerations and potential impacts differ substantially not only between urban and rural settings, but also between rural and semi-rural settings. This should be considered in establishing future siting criteria. The pilot project provides a testing ground for evaluating the different requirements. While respondents in the rural area found some questions irrelevant, the respondents in the semi-rural setting did express some concern, albeit limited with respect to view impact. As a general rule, residents in country residential areas have certain expectations with respect to the amenities of their properties, such as density and views.

5.0 APPROPRIATENESS OF UNIT CONSTRUCTION AND FOUNDATION METHODS USED

5.1 Methods Used

Traditional manufactured housing construction techniques were used by both Winalta and Regent Homes. The prescribed standards and specifications of the garden suite did not require any deviations to traditional techniques, with one exception: it was necessary to devise a new jig to accommodate the gable ended, cottage style roof of the units. The units were all built to A277 standards (Alberta Uniform Building Standards) and were inspected by the architect upon completion. A deficiency list was compiled and no major problems were identified. The average unit construction cost was about $41,500 per unit. The units were transported on a flat bed to the site as per standard procedure.

The Lethbridge units were placed on wooden blocks or cribbings which, in turn, were placed directly on the ground. No pad was prepared. This proved acceptable to the building inspector and is standard procedure in Lethbridge. Some leveling, using the traditional "shimmying" technique, may be required in May and periodically thereafter. The number of times re-leveling will be required in future will be dependent on local soil settling conditions. Again, this is the common approach.

In Parkland, standard foundation techniques also were used. Unlike Lethbridge, however, local soil conditions required that a conventional pad of compacted sand and gravel be prepared. The pads, which are three feet deep and, therefore, required three feet of excavation, were approved by the building inspector. The units will be re-leveled once they have settled, likely in September.

Standard common skirting materials and techniques were applied in both Lethbridge and Parkland.

5.2 Assessment

5.2.1 Unit Construction Methods

No major problems were encountered in constructing the units. The only problem or extra effort required related to the development of the new jig for the roof. This was not considered a major problem in that it was overcome. The jig is also considered a one time cost. In spite of the need to develop the jig, the gable ended cottage style of roof was felt to be appropriate for the garden suite by the manufacturers.

According to the manufacturers, the lack of problems encountered in constructing the units can be attributed to two factors:

- their own expertise/experience in constructing mobile homes;

- working closely with the architect to "polish" the design and specifications.

A cheaper unit could be constructed but not using the same prescribed standards and specifications. Based upon the present design and size, estimated cost savings of 10 percent to 15 percent per unit could be realized on a minimum quantity of 25 to 30 units according to Winalta. Regent Homes indicated that cost savings relate directly to the size of the units and that 50 to 200 units would need to be constructed before any savings could be realized. Regent based this conclusion on labour costs and the time required to complete a

full sized (16' x 80') unit. Because the plant is "set up" on an assembly line system to manufacture full sized units, garden suites intermingled with such units would result in too much "down time". The garden suites take less time to construct, yet the entire assembly line process must be geared towards accommodating the large full sized units. The feasibility of overcoming this assembly line problem by running two garden suites side by side in lieu of one full sized unit could be considered in future.

No problems were encountered, nor did any structural damage occur, during the move. The units were built to be sufficiently flexible to prevent such damage. Minor paint "touch up" was required once placed but this appears to be normal practice. Some siding panels "blew off" one of the Lethbridge units but these were quickly replaced.

The technical performance of the units' building envelope and mechanical systems is based upon the occupancy and host family interviews (post-occupancy) and varies between the Lethbridge and Parkland units.

In Lethbridge, the units were assessed as being well insulated, ventilated and heated. However, floors were considered cold in one of the two units, even when not particularly cold outside. The manufacturer (Regent Homes) is investigating this problem and further investigation of the cold floor problem should be considered if additional units are constructed in future. The Lethbridge manufacturer also suggested that, although condensation was not cited as a problem at present, a wind turbine be considered a standard feature for all future garden suites to avoid condensation problems, particularly since elderly persons tend to maintain a warm environment.

In Parkland, the units were assessed the same as the Lethbridge units including one complaint about cold floors, particularly in colder weather. Two additional features related to building envelope and mechanical systems were noted in Parkland as not satisfactory:

- poor noise insulation was noted as a problem by the occupant of the unit located just off Highway 16X in that he was initially bothered by traffic noise;

- the humidifiers on both units were non functioning initially (but have since been repaired).

The highway noise problem is not considered serious in that the occupant has stated he has already become accustomed to it and it may be a matter of perception. Also, the architect has stated that the noise insulating factor in the garden suites equals that of a conventional single family home. Acceptable noise level is largely a matter of location, insulation and personal perception.

5.2.2 Foundation Methods

In both Lethbridge and Parkland, none of the host families or neighbours were unduly imposed upon by the actual foundation preparation process. The process was considered satisfactory. In both municipalities, the foundation technique selected was considered the most "cost effective way to go" considering local soil conditions. It is premature to assess the performance and suitability of the foundation techniques. The degree of settling/sinking and frequency of required releveling will serve as a measure for such an assessment.

6.0 APPROPRIATENESS OF SERVICING TECHNIQUES USED

6.1 Method Used

In both Lethbridge and Parkland, most services for the garden suites were provided by hooking into those of the host dwellings. Water, sewer, gas and electrical lines were laid in a common trench. Deep trenching was required to avoid freezing. However, for one unit in Parkland and one in Lethbridge, electrical connections were made directly to municipal services. In Parkland, this was because sufficient amperage was not available in the host dwelling (a garden suite requires 60 amps) and in Lethbridge it was because all electrical is overhead. Transformers and separate meters were attached to those units. All other meters are shared between the units and host dwellings.

Sewer pumps were required and were placed in insulated boxes located directly under the units. These pumps can be removed and can accompany the units to another location. At the time of unit removal, all servicing lines will be cut just below the ground surface and then left in the ground.

Telephone extensions from the host dwelling also are provided. These lines are buried 18 inches deep in Parkland. In Lethbridge, the line is contained in the common trench for one unit and is overhead for the second.

The average servicing costs were about $3,700 per unit. All servicing was inspected and approved by the appropriate inspectors.

6.2 Assessment

The Lethbridge families both rated the servicing process as satisfactory. The process was quick and efficiently coordinated - neither families nor neighbours were unduly imposed upon. No major problems were encountered according to the families. However, the TV cable line was inadvertently cut in the case of one unit while the telephone extension line was not placed in the trench in the second because of scheduling and notification problems.

In Parkland, the ratings attributed to the servicing-hookup process by the host families varied substantially, from satisfactory in one case to unsatisfactory at the other. The unsatisfactory rating was based upon the perception that the process was too long and drawn out, too uncoordinated, and that the family was imposed upon since workmen arrived unannounced in the evenings and during meal time. Also, the family felt that a telephone line should have been included in the trench while it was open along with a cable line to allow for an intercom. The intercom is considered particularly crucial since the occupant and host family share the phone line. A remote battery operated intercom is being used in the other unit to advise the appropriate individual of incoming calls. It is important to note, however, that the homeowners' agreement specifically designates that telephone and cable hookups are the homeowners' responsibilities. In future, it appears to be preferable to include these items among the services provided.

From the manufacturers'/contractors' perspective, no major problems were encountered although extra costs and effort resulted because of cold weather and frozen ground conditions which made trenching, insulating and other tasks more difficult. An estimate of actual extra costs encountered could not be easily provided according to the manufacturer.

Actual efforts and costs varied between sites and reflect site specific conditions such as: how easy it is to locate the main lines; where the services are coming from; local soil and temperature conditions; and location of the unit in relation to the host dwelling.

Some coordination problems were encountered in both Lethbridge and Parkland. Coordination of the entire servicing process appears more difficult to achieve in rural areas, perhaps because of the distance factor. The development of a servicing procedures manual or handbook may be considered for future use. The manual or handbook should outline a process for coordination and provide servicing guidelines which are sufficiently flexible to meet local site characteristics, recognize summer and winter working conditions, and allow for differences between servicing in rural and urban locations.

Also in future, the concept of a heated utilidor connecting the host dwelling with the unit could be considered. This was considered for the pilot project but was deemed to be impractical because of the small scale of the project.

7.0 ASSESSMENT OF PLACEMENT METHODS

7.1 Methods Used

In Lethbridge, a crane was used to hoist and place both units from the back lanes onto the cribbings. The cost was $600 for both units and the entire process was undertaken in about 1-1/2 hours.

In Parkland, the units were "rolled" onto the cribbings directly off the flat beds. Costs are included in the overall moving or transporting costs. Actual placement of the units was accomplished in less than half a day.

7.2 Assessment

The craning method was an absolute requirement for one of the two Lethbridge sites because of the "tightness" of the site. It was then decided to crane the second Lethbridge unit onto the pad because an existing fence with concrete pillars would not need to be removed and replaced using the "roll on" method. Also, no trees needed to be removed with craning and the crane was already available for the first unit. The $600 total cost to the manufacturer was considered potentially less costly than replacing the fence when labour and materials costs are taken into account. Both units were placed using this method in less than two hours so that in terms of time, the method is efficient. No problems were encountered and neither the neighbours nor the host family experienced any disruption. All existing vegetation was retained, including a pear tree located within a foot of the dining room window of one of the units.

In Parkland, rolling the units onto the pads was the most cost effective placement method. However, the effectiveness of

this method could be reduced if certain features, such as fences had to be removed and then replaced. No problems were encountered during actual placement and no disruption was noted by the host families or neighbours resulting from the actual placement.

The two placement methods used reflect the inherent differences between urban and rural locations. Each was most appropriate given the local site characteristics, appears to have worked well, and was cost efficient. The actual method selected in future should be dependent on site specific characteristics and resultant cost effectiveness.

8.0 APPROPRIATENESS OF METHODS FOR DELIVERY AND CONTROL OF GARDEN SUITES

The persons/representatives interviewed to allow for a preliminary assessment of the above issue have been grouped according to their role in, and/or knowledge of, the garden suite pilot project. Five such groupings have resulted including approved applicants (host families and occupants), neighbours, representatives of the sponsoring agencies, manufactured housing industry representatives and representatives of relevant agencies/groups not involved in the pilot project.

The interviews addressed three sub issues including: a) appropriate delivery procedures; b) appropriate controls; and, c) the roles of agencies and the manufactured housing industry in delivering and controlling garden suites. The scope of the interviews was to assess the procedures followed and to suggest alternatives. Representatives of agencies not directly involved in the project were only asked for general comments related to the concept, and the delivery and control of garden suites. Methods have been assessed on the basis of effectiveness, fairness, applicability across the province, sensitivity to neighbours concerns, ease of administration and time requirements.

8.1 Appropriate Delivery Procedures

8.1.1 Raising Public Awareness and Soliciting Applications

Methods Used

A multi-pronged approach was used in both Lethbridge and Parkland for raising public awareness and soliciting applications. The approach included wide distribution of fact

sheets and application forms, advertisements in local newspapers and encouragement of media coverage. Media coverage included several stories in local newspapers and numerous radio and television reports.

Assessment

Both applicants and neighbours were asked, as part of the preoccupancy surveys, how they initially heard of the garden suite. In Parkland, the applicant responses were as follows:

- during the spring provincial election;

- word of mouth from a peer (fellow building contractor).

Neither applicant obtained any information through the public awareness program.

One applicant obtained additional information from AMHC and, in turn, the Meridian Foundation (this after making numerous calls to a variety of provincial government departments). The second applicant contacted the County of Parkland and also was directed to the Meridian Foundation. Once the Foundation was contacted, information and application forms were easily obtained.

In Lethbridge, once again, neither applicant was aware of the public awareness program. Initial awareness of the garden suite was obtained through word of mouth in one case. The second applicant saw the garden suite displayed as part of the National Garden Suite Demonstration Project at a local home and garden show in 1987. This was augmented by references to the garden suite concept made during the spring 1988 election, as well as various newspaper articles.

The applicant who relied on word of mouth for initial awareness heard of the garden suite concept from a senior citizen. How the senior became aware of the concept is not known by the family. The Lethbridge Housing Authority was then contacted for further information and assistance.

The second applicant indicated that it was not easy to get further information once they became aware of the concept. The City was approached and was of little assistance. Eventually the Housing Authority was approached and provided the necessary information and application forms.

All neighbours contacted in Parkland first heard of the concept as a result of the tea party invitation. In Lethbridge, only one neighbour was aware of the concept before the tea party invitations and/or development permit approval notices were issued. The neighbour cannot recall how she first became aware of the concept. All others were made aware of the concept by the tea party and/or development permit approval notices.

Of the nine representatives of the sponsoring agencies interviewed, six indicated that sufficient time and effort was not devoted to the public awareness process. Greater effort may have resulted in more applications. Suggested improvements include: a more concerted and lengthy marketing and education process, particularly at the local level; more demonstration units; and more participation from other seniors related groups representing potential consumers. Also, summer was not considered an appropriate time to run an awareness program. However, because of project scheduling, this was the only time when such a program could have been run. In future, a province wide public awareness and education program could be considered if the garden suite concept is adopted.

8.1.2 Selecting Applicants

Methods Used

Applicants for the garden suite units were selected on the basis of the eligibility criteria defined by the project conditions. These criteria relate to both the occupant and the homeowner and are summarized below.

1. The Occupant

The occupant must be elderly (55 years of age or older in Lethbridge and 65 years of age or older in Parkland) and have a child or grandchild who is a homeowner and is eligible to participate in the project as the occupant's host family. The occupant must require some degree of care and service from the host family in order that the philosophy of the garden suite concept can be tested.[3]

2. The Homeowner

The homeowner's property must be large enough to not only accommodate the garden suite, but to allow appropriate placement as defined by the siting criteria developed by each municipality. The homeowner must be able and willing to provide the care and service required by the garden suite occupant and be prepared to enter into a lease/occupancy agreement for the garden suite with the province. This agreement is described in Section 5.4. Included in the agreement is the rent requirement which is the obligation of the homeowner.

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[3] *The philosophy of the garden suite concept is that the elderly occupant will benefit from the close proximity of family members who are ready and willing to provide some degree of supportive medical and/or lifestyle care and service.*

Assessment of the applicants on the basis of the selection criteria was done through evaluation of application forms and interviews of occupants and homeowners by management agency representatives. The working committees in each location then achieved a consensus ranking and obtained approval from the respective steering committees. Because of the large number of applicants, a pre-selection information meeting was held in Lethbridge.

Assessment

The applicants and representatives of the sponsoring agencies, the manufactured housing industry and relevant agencies/groups not directly involved in the pilot project were asked to comment on the selection criteria and the selection process. The applicants all considered the selection criteria to be fair and valid and the interview selection process to be well handled. The pre-selection information sessions in Lethbridge were particularly appreciated by some.

The representatives all considered the selection criteria and process to be appropriate **for the pilot project**. A variety of opinions with respect to eligibility/selection criteria for future consideration, as well as potential selection process options, are outlined below.

1. Eligibility/Selection Criteria

- Most representatives felt that the concept should be available to all seniors, although the eligible age to be classed a senior varied. Some representatives commented that demand will not be excessive in that "tomorrow's" senior will be younger, more mobile, more active and wealthier. In other words, most will not need, or want, the concept but the option should be available. Also, more couples will require

accommodation in future as life expectancy of males increases. Many couples will find the units and living arrangements too cramped.

- A limited number of representatives felt the concept should be broadened to accommodate physically and mentally handicapped persons as well as seniors - or "anyone who, with the help of the family", can remain independent. Those representatives who felt that the concept should be restricted to seniors were concerned about control if eligibility were broadened to include the physically and mentally handicapped, particularly in rural areas. Neighbourhood acceptance was noted as a potential problem in urban areas. Limiting the concept to the elderly was not seen as discriminatory or violating the Charter of Rights in that "you have to draw the line somewhere". Parameters applied to current senior housing options are needed and also could be viewed as discriminatory. The same principle applies to garden suites. The pilot project is only "testing" parameters for seniors.

- In general, most representatives felt that a blood relationship between a garden suite occupant and a host should remain in future. Only one representative felt the relationship should not be limited to the family, but that criteria would be required to establish suitable relationships.

- Most representatives felt that "frail" should include mental or emotional, as well as physical frailty. Only two considered "frailty" to be important for future consideration.

2. Selection Process

- Most representatives agreed that the selection process used in the garden suite pilot project should be streamlined in future and be consistent. Relationships among family members would need to be assessed as part of a screening process.

- Most representatives also felt that the same selection processes that are currently in place to gain access to senior's housing should be applied to the garden suite. This approach would not necessarily have to be structured to limit applicants to low income seniors.

- Some felt that, in order to avoid potential abuse of the senior and to ensure that adequate care and service can be provided, a screening process should include assessment by a panel of trained health care and social service professionals. One representative considered the mix of professionals used in the Parkland process a "good mix".

- One representative, who suggested the garden suite option be available to all persons requiring the support of a family to remain independent, proposed that garden suites be classed as "medical support housing" by the Planning Act and licensed accordingly. The selection process in this case would be through a "single point of entry". Medical support housing would not violate the Charter of Rights since the option would not be limited to seniors.

To conclude, initial attitudes and positions of those interviewed were that, for the short term future at least, the garden suite concept should be limited to seniors and that a familial relationship should be required between occupant and

host. Attitudes on the eligibility age of the senior varied and most felt that frailty should not be a prerequisite. A number favoured the current selection process used to gain entry to provincially owned subsidized seniors housing with some greater emphasis on screening of the applicants (occupant/host) by a panel of appropriate "trained professionals".

8.1.3 Land Use and Development Approval Techniques

Methods Used

The methods used for the land use and development approval of the garden suites are summarized as follows:

1. Lethbridge - The Land Use Bylaw (LUB) was amended to permit garden suites. Normal amendment procedures were followed. The LUB is worded in a manner so that the pilot project units can be approved but not other types of units.

   - Tea parties were held to inform the applicants' neighbours of the project and the potential placement of the garden suites. No one attended.

   - Temporary development permits were approved and issued for the garden suites. The permits were approved conditional upon Alberta Planning Board Orders waiving Section 78 of the Planning Act. The waivers would permit more than one dwelling on a single lot. Like the development permit, the orders are temporary in nature and apply only for the duration of the pilot project.

2. Parkland - Tea parties were held, one of which was reasonably well attended.

- Temporary development permits were approved and issued for the garden suites. Approval was conditional upon ratification of Ministerial Orders which declared the two sites to be Innovative Residential Development Areas under Section 149 of the Planning Act. The orders are valid only for the duration of the pilot project.

The approach taken in Lethbridge most closely follows normal planning practises.

Assessment

All municipal, provincial and housing agency representatives agreed that the methods used for obtaining land use and development approval worked well considering local circumstances and preferences. All approvals were provided as required and no major problems were encountered. The development permit approach, which ensures development control at the local level, was particularly favoured.

Lethbridge representatives considered the LUB amendment as the most appropriate method and would apply the LUB approach in future, assuming there would be changes to Section 78 of the Planning Act legislation. Parkland also favours this approach for future use. Representatives of Alberta Municipal Affairs strongly favoured the LUB approach in that such an approach follows normal planning practise. The need for legislative changes is fully recognized.

The land use and development approval techniques used in the Lethbridge case, therefore, is assessed as being more

effective, efficient, applicable and easier to implement than the Parkland approach in that normal planning practices, as prescribed by the Alberta planning system, were followed. Local municipal control and discretion can be insured. Enabling legislation and/or amendments to the Planning Act will be required to allow the universal application of such a process. The actual approval of garden suite development can then be left to the discretion of the local municipality, as long as it is compatible with provincial policies. Provincial legislative changes can provide the vehicle by which such discretion can be applied. One factor which should be considered when considering bylaw and legislative changes is density. None of the neighbours interviewed considered this to be a relevant issue. Nevertheless, planning representatives interviewed stated it should be addressed.

Most municipal, provincial and housing agency representatives favoured the tea party approach for addressing neighbourhood concerns and sensitivities. Two of the four applicants considered the tea parties to be a "good idea" although only one of these was attended. The remaining two applicants did not feel they were necessary. One of the two, located in a very rural environment, considered such a party totally irrelevant considering local circumstances. The neighbours agreed and no one attended. The second applicant, located in an urban setting, felt that directly approaching the immediate neighbours was the most effective method for informing them of the proposed placement and garnering support. This, in fact, was done and no one attended the tea party.

It is interesting to note, that in the Lethbridge case where the applicant considered the tea party to be a necessary and "good idea", none of the three neighbours contacted recall receiving notice of the tea party, although such notice was in fact mailed out. One neighbour stated that he "most certainly would have attended had he known". This individual first

became aware of the proposed unit placement upon receipt of the development permit approval notice. A second neighbour became aware of it only once it was actually placed. In fact, because the unit is not visible from his home, he was not immediately aware of its existence. The third neighbour, again, was first notified through the development permit approval notice although she was aware of the proposal as a result of other sources (word of mouth).

To summarize, the tea parties were viewed by most as being a necessary process for addressing neighbour sensitivity. Although such sensitivity and fairness is already built into the planning system, additional measures such as the tea party approach can easily be incorporated into the existing system and can be applied province wide. The holding of a tea party could be made a requirement of the development permit process. Parameters and procedures for the required tea party could be prescribed by the Planning Act, similar to the public hearing processes outlined by the Act.

8.2 Appropriate Controls

Three agreements have been put in place to control the use of garden suites. These agreements are all legal instruments and are described and assessed in the subsections which follow.

8.2.1 Provincial-Municipal Agreement

Description

The provincial/municipal agreements contain the terms and conditions of the garden suite pilot project as agreed upon by the province and the participating municipalities. The agreements define the obligations of the province and the municipalities.

Assessment

This agreement was considered appropriate by all representatives of the sponsoring agencies for the purposes of the pilot project. One representative considered this, and the remaining two agreements, to be more complex than needed but recognized that the "ideal" was desirable for a pilot type of project. The applicability of the provincial-municipal agreement in future is directly related to the method of delivery and control and the roles the province and municipalities would assume.

8.2.2 Homeowner's Licence Agreement

Description

The homeowner's licence agreement is between the homeowners and the province and is similar to a lease agreement. The licence deals with such items as amount of rent, other financial obligations such as utilities and taxes, details related to repairs and cleanliness, and alterations and improvements, occupying conditions and insurance and indemnity clauses.

Assessment

All four applicants favoured the homeowner licence approach in that their interests were protected. It was viewed in the same vein as a rental agreement. One comment, directed at the $1,000,000 liability requirement clause was made. However, this was not considered of critical concern by the applicant.

No comments were directed at the homeowner's licence by any of the sponsoring agency representatives interviewed other than it being necessary for ensuring control and protection of

government property. All agreed that the agreement is fair and valid.

The homeowner licence was cited by most representatives as a viable option for future use. It is considered a particularly strong means of ensuring occupancy control. One representative stated that for wide application in future, the licence agreement may need to be simplified. The applicants did not seem to share this view. If used in future, it was suggested to be renewed annually. It should be noted that its future applicability is dependent upon the delivery methods assumed and future management roles of government and private sector agencies.

The applicability of the Landlord and Tenant Act to the pilot project and in future was noted as a related issue to be resolved.

8.2.3 Management Agreement

Description

Management agreements have been put in place between the province and two bodies, the Lethbridge Housing Authority and the Meridian Foundation, to manage the garden suites. These bodies will manage the units for the duration of the project in much the same manner that a property manager manages rental accommodation. As such, a major obligation of the bodies, as stated by the agreement, is "to manage and administer the units once in place by collecting the rents, continually monitoring and inspecting the well being of the occupants and the units, ensuring routine maintenance and repair work is undertaken, and maintaining appropriate records on all rents collected and costs incurred in routine maintenance and repair".

Assessment

The management agency representatives, in particular, considered these agreements to be appropriate for the pilot project and potentially, for future management purposes. The management agreement was viewed as an effective means of policing and, therefore, controlling unit occupancy. All other sponsoring agency representatives considered this agreement appropriate for the project. The host families also considered the techniques outlined by the agreement for rent collection, maintenance and repair as well as monitoring and control, to be appropriate. Again, their potential use of the management agreement is dependent upon the roles of these and other agencies in delivering and controlling garden suites.

8.3 Roles of Agencies and the Manufactured Housing Industry

Representatives of the sponsoring agencies, the manufactured housing industry and other relevant groups were asked to comment on the appropriate methods for controlling and delivering garden suites in future and the role that various agencies and private industry could play. The two issues (how and who) are inextricably linked. Representatives of the sponsoring agencies also were asked to comment on the appropriateness of the approach taken in the pilot project.

The general consensus was that the approach taken in the pilot project was appropriate, and was the only available option. One representative felt that the entire process for delivery and control could have been undertaken at the local level with less provincial involvement.

All representatives interviewed strongly agreed that ownership of the units in future should remain with "someone" other than the occupant or host family. Control of ownership was seen as the most effective means of controlling occupancy itself and

the temporary use of the suites by approved occupants. Removal of the units should be the responsibility of the agency (private or public) which owns the units. Most representatives felt the units should be provincially owned. A representative of the manufactured housing industry felt that the industry should deliver and own the units, and also act as the rental agent. Two sponsoring agency representatives felt both options should be considered.

All representatives agreed that some control with respect to the use or intent of garden suites will be needed at the provincial level and that land use should be controlled by the local municipality.

Based upon the feedback obtained, two basic scenarios have been developed with respect to the future roles of agencies and industry in delivering and controlling garden suites.

1. That garden suites be provided as another form of subsidized seniors housing, through the existing seniors housing program. As such, the units would be owned by AMHC and managed by local non profit housing agencies. The role of the private sector would be to manufacture and deliver the units to AMHC. The role of the municipality would be to approve and regulate land use through the LUB and development permit approval process, assuming provincial enabling legislation. The municipality could licence the unit in the same manner as mobile homes and the licence could be renewed annually. A licence fee would be paid in lieu of municipal taxes.

   Some variations to this scenario, such as designating garden suites as medical support housing rather than seniors housing, were suggested. Further, the subsidy formula could be set to cancel subsidies for higher income groups. Also different agency options to monitor and

control occupancy, such as public health units, were suggested. Nevertheless, key roles, in terms of provincial ownership, municipal land use control, and private sector manufacture and supply of units, remain the same.

2. That the private sector take the lead role in the marketing and delivery of garden suites. Provincial involvement would be limited to establishing eligibility criteria and providing land use enabling legislation. Control of land use and licensing should be a municipal role. The units would be owned by a private sector rental agency. A buy back agreement between the agency and the host family could be considered an option but is not considered desirable for ensuring control. The host family would be responsible for servicing, and, possibly restoration costs. Provincial involvement would be limited and the concept could be controlled largely through the "self policing" resulting from the financial investment needed on the part of the host family.

   This model or scenario is explained in detail in a Garden Suite Rental position paper prepared by the Executive Director of the Manufactured Housing Association of Alberta and Saskatchewan. The Executive Director has indicated that provincial support of the concept would be required in the form of industry subsidies, such as an interest shielding program or insuring installation and removal costs. Without assistance, the size of the market would be limited in that only those who are "well off" could afford a unit.

9.0 APPROPRIATENESS OF THE GARDEN SUITE CONCEPT

The assessment of the appropriateness of the garden suite concept is based upon preliminary information related to four factors including demand, general satisfaction with the units and the concept, overall attitudes toward the concept and cost.

9.1 Demand

The initial attitudes and positions of all representatives interviewed on potential demand were basically the same - a **limited** demand exists. No representatives anticipated a significant demand for the following reasons.

- The concept is limited in terms of lot size. Most of the demand will stem, therefore, from rural and semi rural areas since some urban lots are too small to **conveniently** accommodate the units. This is not to say they can not be accommodated, but that amenity space will be severely reduced which detracts from the appeal of the concept.

- The concept is limited to appropriate "fit". In other words, a close family unit where the host family is prepared to provide care and service to the occupant and accept their presence in their own back yards is required to make the concept work. Considering today's nuclear family unit structure, the number of appropriate "fits" is limited. Nevertheless, it was noted that this may be changing and family units may become stronger and more traditional in future. "Baby boomers" appear to be more concerned about the welfare of their elderly relatives as they themselves age.

- The concept may be limited to those families with reasonably substantial incomes unless some form of subsidy is provided. Ownership of a single family home is mandatory and the financial means to pay market rents and, potentially, servicing, placement, removal and/or restoration costs is required.

- The concept as currently structured is limited to those seniors with relatives.

- The limited number of applications in the pilot project may be an indicator of future demand.

In general, therefore, demand is not seen as being substantial. The large demand levels resulting from the National Garden Suite Demonstration Project and the associated Gallup survey may be optimistic because of the manner in which the surveys were done and the survey parameters which were used. The number of applicants that withdrew from the pilot project upon further consideration suggests that initial enthusiasm for the concept may wane once the realities and requirements are recognized. Nevertheless, it is important to stress that some demand is considered to exist. As family units grow stronger, this demand may increase, particularly as seniors become healthier and may wish to maintain their independence longer. Alternatively, as seniors become more affluent, the garden suite concept may not meet their expectations. Also, the concept appears to work best for single, not double occupancy. This may be a further limiting factor on demand, particularly as the age expectancy of couples, both male and female, increases.

9.2 General Satisfaction

9.2.1 Design, Construction, Servicing, Placement and Siting

1. **Occupants:** Generally, the design and construction of the units was considered to be satisfactory to very satisfactory. Initial high expectations were met or exceeded. The unit design was particularly satisfying. The overall placement process, including site preparation and servicing, was rated as satisfactory. No **major** problems were encountered. All occupants are satisfied with unit siting.

2. **Host Families:** All families have provided positive feedback on the unit design and construction and are very satisfied. Only minor concerns were noted. Also, criticisms related to disruption in terms of the entire servicing and placement process were minor. All families are pleased with the siting aspects of the units.

3. **Neighbours:** All neighbours contacted were generally satisfied with the appearance of the unit. Most responded very positively although one respondent indicated that the units were "too utilitarian". Nevertheless, he would contemplate such a unit in his own back yard. No undue disruption was noted and all neighbours were generally satisfied with the placement process and the manner in which the units are sited.

4. **Other Applicants:** Only one case was reported of an applicant having withdrawn because of the unit design. The applicant was a couple who wanted a two bedroom unit.

5. **Management Agents and Municipalities:** The management agency representatives interviewed and all municipal officials expressed satisfaction with the unit design,

construction and siting. From their perspectives, the servicing and placement process in both municipalities went smoothly, no major problems or setbacks were encountered, and they would apply the same approach in future.

6. **Industry:** Generally, the industry representatives expressed satisfaction with the unit design and construction. The "look" of the unit was particularly pleasing although one industry representative labelled it "boring", but recognized the need for a generic look. Nevertheless, suggestions for improvement were provided. The entire placement process was generally rated as being satisfactory although it was noted that more efficient and "transferable", temporary forms of servicing should be considered. Also, it was strongly recommended that cold weather conditions be avoided.

9.2.2 Care and Services Provided

1. **Occupants:** All occupants reported being very satisfied with the care and services they are receiving as a result of the garden suite living arrangements. Initial expectations have generally been exceeded.

2. **Host Families:** Without exception, all families also are very pleased with the level of care and service they are able to provide the occupant as a result of the new living arrangements. The impact on the host families has generally been positive.

3. **Other Applicants:** At least one applicant who withdrew noted that she "was still too independent". Other applicants (potential occupants and host families) withdrew "because they were not sure" about the concept

and did not know if it would meet their particular family needs.

9.2.3 Delivery and Control Mechanisms

Delivery and control mechanisms applied in the pilot project were somewhat different in Lethbridge and in Parkland. In general, all respondents expressed satisfaction with the mechanisms used.

9.3 Overall Attitude Toward The Garden Suite as a Concept

All respondents in all five groupings were asked to express an opinion on the garden suite concept. Of the 40 some responses, virtually all responded with enthusiasm in support of the concept and stated that it is an appropriate seniors housing option for future consideration. Several respondents saw it as a "good transition" between completely independent living and lodges and/or nursing homes. Most respondents viewed it as a means of perpetuating close family units and allowing existing care and support services to be enhanced by families. Proximity to family and the degree of responsibility the family is willing to assume is very important in this regard.

Several respondents felt that the concept was more appropriate in rural areas and that the institutions provided in urban areas are adequate. Proximity was not considered an issue in urban areas. Some respondents also suggested that the concept provided a viable option to "in home", shared living arrangements.

9.4 Cost

The units were generally considered to be cost effective relative to other forms of senior housing. The rents being

charged are comparable to the cost of one bedroom apartment units in many communities. In light of recent market rent increases, the garden suite rents in the pilot project may, in fact, be substantially lower than market rents. Comparisons with lodges and self contained provincially owned seniors apartment complexes, in particular, provide insight in terms of cost effectiveness of garden suites. Comparisons are as follows:

	Self Contained Apartment	Garden Suite Unit
Average Capital Cost (1989-90)	$59,375[1]	$41,500[2]
Servicing Cost	Included in Capital Cost	$ 3,700[3]
Removal and Restoration Cost	Not Applicable	$ 5,500[4]
Total	**$59,375**	**$50,700**

[1] Based on two recently completed projects resulting in capital costs of $56,224 and $62,523 per unit, excluding land.

[2] Average based on Lethbridge and Parkland experience.

[3] Average from pilot project experience.

[4] Amount based on figures provided in the tenders.

According to the foregoing cost figures, a cost savings of about $8,000 is realized with the garden suite unit. However, this comparison does not take into account the capital cost of the land for the self contained apartment unit or the frequency of garden suite relocation, both of which will affect the final comparisons. For example, the average cost of land is about $10,000 per unit and additional costs of about $9,000 (1990 dollars) per unit could be incurred, each time a garden suite is moved.

	Lodge Unit	Garden Suite Unit
Capital Cost (1989-1990)	$41,666*	$41,500
Servicing Costs	Included in Capital Costs	$ 3,700
Removal/Restoration Costs	Not Applicable	$ 5,500
Total	**$41,666**	**$50,700**
Administration and Operating Costs	$790/month/unit	Not Applicable

* Based upon a recently completed 60 unit lodge in Stony Plain (excludes land).

Again, the above comparisons exclude two factors important in comparing the cost of lodge accommodation to garden suites: the cost of land for the lodge unit; and lodge operating and maintenance costs which average $790 per month. This average cost is based upon the Stony Plain example where, in 1987, operating costs were approximately $250/unit/month and administrative costs were $540/unit/month for a combined total of $790/unit/month. Operating expenses include utilities, food, maintenance and repairs. Administrative expenses include, among others, staff, office and board meeting costs. Furthermore, some lodges across the province reportedly operate at a deficit. These deficits are a municipal burden.

The administrative and operating cost for garden suites is not yet known but will be considerably less than that for lodges (although these costs are not comparable). More detailed information and investigation will be required to provide meaningful comparisons.

A final method of evaluating the cost effectiveness of garden suites is by comparing government housing subsidized rents with the garden suite rents. In most provincially owned self contained apartment complexes, seniors are subsidized so that their rental cost is 25 percent of gross income. No similar subsidies have been provided for garden suite occupants. A comparison of rents that occupants would pay in government subsidized housing and in garden suites indicates that the occupants are paying more in the garden suites, even assuming that all will qualify for assistance under Senior Citizens Renter Assistance Program.

9.5 Concluding Statement

Based upon the four factors examined for preliminary assessment purposes, the garden suite concept is an appropriate and viable seniors housing option.

APPENDIX I

PRE-OCCUPANCY SURVEYS

Occupant Survey
Pre-occupancy

I. General Profile

1. Name _____
_____

2. Age _____

3. Marital Status

- ☐ Single
- ☐ Married
- ☐ Widowed
- ☐ Separated
- ☐ Divorced

4. Monthly Income $_____

5. Relationship to Host Family _____

II. Health Status

1. Do you have any physical disabilities which prevent you from being fully independent?

- ☐ Yes
- ☐ No

If yes, what are they? _____
_____
_____
_____

2. Do you have any major medical problems which require ongoing treatment?

- ☐ Yes
- ☐ No

If yes, what are they? _____
_____
_____

3. Does the treatment require regular visits to a doctor or medical facility?

- ☐ Yes
- ☐ No

If yes how frequently _____
_____
_____
_____

Do you require assistance getting there?

- ☐ Yes
- ☐ No

If yes, what sort and from whom? _____
_____
_____

4. Do you receive any at home care services?

- ☐ Yes
- ☐ No

If yes, which ones?

- ☐ VON
- ☐ Home Care
- ☐ Home Help
- ☐ Meals-on-wheels
- ☐ Others, please specify _____
_____

Is there any cost to you for any of these services?

- ☐ Yes
- ☐ No

If so, how much? $_____

Do you need some additional support services?
_____
_____
_____
_____

5. On the whole, how would you rate your health?

- ☐ Good
- ☐ Satisfactory
- ☐ Poor
- ☐ Very Poor

6. Summary of Functional Ability

Mobility:

- ☐ Wheelchair
- ☐ Requires Assistance
- ☐ Independent

Meal Preparation:

- ☐ Extensive Assistance
- ☐ Some Assistance
- ☐ No Assistance

Dressing:

- ☐ Extensive Assistance
- ☐ Some Assistance
- ☐ No Assistance

Personal Hygiene:

- ☐ Extensive Assistance
- ☐ Some Assistance
- ☐ No Assistance

Household Chores:

- ☐ Extensive Assistance
- ☐ Some Assistance
- ☐ No Assistance

III. Present Accommodation

1. What is your present type of accommodation:

- ☐ Own home
- ☐ Own Apartment
- ☐ Share home/apartment with family member
- ☐ Share home/apartment with non-family member
- ☐ Seniors Apartment
- ☐ Seniors Lodge
- ☐ Nursing Home
- ☐ Home for Special Care
- ☐ Other Specify _____

2. How independent are you in your present living arrangements?

- ☐ Totally Independent
- ☐ Independent with Some Assistance
- ☐ Quite Dependent on Assistance
- ☐ Very Dependent on Assistance

3. What is your principal form of transportation to and from your present arrangements?

- ☐ Drive My Own Car
- ☐ Use Public Transit
- ☐ Use Taxi Service
- ☐ DATS
- ☐ Rely on Friends and Relatives

4. What do you like most about your present living arrangements?

- ☐ Privacy/security
- ☐ Independence
- ☐ Location (distance to shopping)
- ☐ Local Amenities (communityfacilities)
- ☐ Design/Layout/Special Features
- ☐ Friends/Social Contacts
- ☐ Proximity to Family
- ☐ Other, specify _____

5. What do you dislike the most about your present living arrangements?

- ☐ Lack of security
- ☐ Lack of independence
- ☐ Lack of privacy
- ☐ Distance to shopping areas
- ☐ Distance to other community/social facilities (eg. church, seniors drop-in)
- ☐ Poor design/layout/lack of special features
- ☐ Lack of friends and social contact
- ☐ Proximity to family
- ☐ Other, specify _____

6. Does your family provide necessary support services?

- ☐ Yes
- ☐ No

If yes, in what form? _____

_____

_____

_____

7. Which family member provides the most support?

_____

_____

_____

8. Do friends and neighbours provide any support services?

- ☐ Yes
- ☐ No

If yes, in what form? _____

_____

9. Do you feel a part of your neighbourhood? _____

_____

_____

10. What specific community activities/facilities are available?

- ☐ Seniors Club/Drop-in
- ☐ Church Services
- ☐ Community Centre
- ☐ Leisure Programs (Bingo, Exercise, Dance)
- ☐ Legion
- ☐ Other _____

_____

11. Which, if any of these activities/facilities do you use? _____

_____

_____

12. How frequently?

- ☐ As Available
- ☐ Daily
- ☐ Weekly
- ☐ Monthly
- ☐ Seldom

13. What proportion of your total income do you pay for your present accommodaion? $_____

Does this include utilities? _____

_____

14. Do you receive any assistance from government housing assistance programs?

- ☐ Yes
- ☐ No

If yes, which program?_____

How much assistance? _____

15. Do you receive any financial assistance from your family to maintain your present lifestyle?

- ☐ Yes
- ☐ No

If yes, how substantial in relation to your total income?

_____

_____

16. Is your present accommodation affordable?

- ☐ Yes
- ☐ No

17. Do you feel a strong dependence on your family in your present accommodation? _____

_____

_____

IV. Garden Suite Accommodation

1. Why do you want a garden suite? _____

2. What are your expectations?

a) Unit features:

Size _____

Layout _____

Furnishability _____

Special Features _____

Privacy _____

Security _____

Independence _____

Use of Yard Space _____

b) What family support services do you expect? _____

c) Will any at home care services be replaced?

☐ Yes

☐ No

If yes, which ones? _____

d) Will any support services provided by friends and neighbours be replaced?

☐ Yes

☐ No

If yes, which ones? _____

e) Will you be able to maintain social contact with these friends and neighbours?

☐ Yes

☐ No

Comment _____

f) Will your proximity to community/social facilities (church, drop-ins)

☐ Improve

☐ Decrease?

Comment _____

g) Do you expect your overall quality of life to improve?

☐ Yes

☐ No

If yes, why? _____

If no, why not? _____

3. What other housing options, if any, have you considered? _____

4. What would be your next preferred option, and why? _____

5. How affordable to you is the option compared to the others you may have considered? _____

6. What proportion of your total income will go towards housing? _____

7. What support services do you expect to contribute to the family? _____

8. What misgivings, if any, do you have? _____

Notes: _____

Host Family Survey Pre-Occupancy

I. General Profile

1. Name of Homeowner(s)_____

_____

_____

2. Age _____

3. Family Members

Name	Age	Sex	Relationship
_____	___	___	_____
_____	___	___	_____
_____	___	___	_____
_____	___	___	_____
_____	___	___	_____
_____	___	___	_____
_____	___	___	_____

4. Relationship to occupant _____

5. Who is the primary caregiver._____

II. Property Profile

1. Size of Property_____

_____

_____

2. Size of Home_____

3. How many bedrooms are in your home? _____

4. How many bathrooms are in your home? _____

5. What amenities are found on your property for use by the senior?

- ☐ Extensive landscaping
- ☐ Garden
- ☐ Horse Paddock
- ☐ Other, specify _____

_____

_____

_____

_____

_____

III. Neighbourhood Profile

1. What type of neighbourhood is your home located in?

- ☐ Urban
- ☐ Semi-Rural

2. How close are your nearest neighbourhoods?

- ☐ Next door
- ☐ Within sight
- ☐ More Distant (specify) _____

3. If next door, how visible is your yard from your neighbours home? _____

_____

_____

4. What is your current relationship with your neighbours?

- ☐ Good
- ☐ Fair
- ☐ Poor
- ☐ No Relationship or Contact

5. What community activities/facilities are available in your neighbourhood for the occupant?

- ☐ Seniors Centre/Drop-in
- ☐ Church
- ☐ Community Services
- ☐ Leisure Programs (Bingo, Exercise, Dance)
- ☐ Legion
- ☐ Other

6. Are there other elderly people in your neighbourhood?

- ☐ Yes
- ☐ No

_____

_____

_____

_____

IV. Present Occupant Accommodation

1. What are the major disadvantages, from your perspective, of the occupant's current living arrangement?

   - ☐ Proximity to Your Home
   - ☐ Distance to Shopping Facilities
   - ☐ Distance to Medical Facilities
   - ☐ Lack of Community Facilities/Amenities
   - ☐ Inadequate Security
   - ☐ Poor Design/Layout/Lack of Special Features
   - ☐ Lack of Friends and Social Contact
   - ☐ Other, specify _____

2. Which of the above would be eliminated through the garden suite concept? _____

3. What are the advantages, from your perspective, if any, of the occupant's current living arrangements which may be eliminated with the garden suite concept?
   (eg. family privacy, occupant's independence, occupant's social contacts)

4. Which of the following support services do you presently provide? Approximately how many hours a week for each?

   - ☐ Regular Visit/Companionship
   - ☐ Shopping Errands
   - ☐ Meals, Preparation and Delivery
   - ☐ Accompanying to Medical Appointments
   - ☐ Social and Other Transportation Needs
   - ☐ Household Chores
   - ☐ Bathing and Other Personal Assistance
   - ☐ Nursing Assistance

5. When you and your family are away, who provides these services? _____

6. How much cooperation do you get from your extended family in caregiving support?

   - ☐ None
   - ☐ Some
   - ☐ Extensive

7. How proximate is your extended family? _____

8. Does the current living arrangement create stress for you in terms of such factors as:

   - ☐ Concern over Health and Safety
   - ☐ Concern over Security
   - ☐ Time Spent on Care Due to Proximity
   - ☐ Concern of Occupant's Future
   - ☐ Concern over Adequate General Care
   - ☐ Concern over Social Contact
   - ☐ Others, specify _____

Which create the most stress, if any? _____

9. Do you consider the current situation to be an unduly difficult one for you and your family?

☐ Yes
☐ No

If yes, why? _____

10. If you are presently subsidizing the occupant, is the amount substantial relative to your financial capabilities? _____

V. Garden Suite Accommodation

1. Why did you choose the garden suite? _____

2. What are your initial, general expectations? ____

3. Do you expect to provide a greater degree of support service and care?

☐ Yes
☐ No

If yes, please specify. _____

4. Do you intend to replace existing service and care programs being utilized?

☐ Yes
☐ No

If yes, which ones? _____

5. Do you intend to replace care and service being provided by friends, neighbours, and extended family? _____

6. Do you expect the stress of providing adequate care and service to the occupant to drop? _____

7. What services do you expect the occupant to contribute to the family? _____

8. What other housing options, if any, have you considered for the occupant? _____

9. What would be your next preferred option, and why? _____

10. Do you expect to provide financial support to the occupant? _____

To what extent? _____

11. What, if any, changes to your lifestyle do you anticipate? _____

12. How do you expect the garden suite may affect your amenity space? _____

13. What misgivings do you have, if any? (eg. Lack of privacy, too many demands, neighbour's response.) _____

VI. Application/Selection Process

1. How did you first hear of the garden suite? ____

2. Did you find it easy to get more information?

☐ Yes
☐ No

If yes, how did you get more information? ___

If no, please explain. _____

3. Whose idea was it to apply? _____

4. Did you find it easy to obtain application forms?

☐ Yes
☐ No

If no, please explain. _____

5. Were the application forms easy to complete?

☐ Yes
☐ No

If no, why not? _____

6. Did you find the interview selection process to be fair and well handled?

☐ Yes
☐ No

If no, how could it be improved? _____

7. Were the selection criteria fair and valid?

☐ Yes
☐ No

If no, please explain. _____

8. Did you have any meaningful input into the siting proposed for the unit?

☐ Yes
☐ No

Would you have liked to have more input? ___

☐ Yes
☐ No

In what way, please specify. _____

9. Was the tea party process a good idea?

- ☐ Yes
- ☐ No

Did you think it was necessary?

- ☐ Yes
- ☐ No

Did you find it intimidating?

- ☐ Yes
- ☐ No

10. Was the overall process well handled?

- ☐ Yes
- ☐ No

Did you find it too difficult or complicated?

- ☐ Yes
- ☐ No

11. Is the Homeowner's Agreement appropriate?

- ☐ Yes
- ☐ No

Comments

10. Do you expect to provide financial support to the occupant? _____

_____

_____

To what extent? _____

_____

_____

11. What, if any, changes to your lifestyle do you anticipate? _____

_____

_____

12. How do you expect the garden suite may affect your amenity space? _____

_____

_____

13. What misgivings do you have, if any? (eg. Lack of privacy, too many demands, neighbour's response.) _____

_____

_____

_____

VI. Application/Selection Process

1. How did you first hear of the garden suite? ____

_____

_____

_____

2. Did you find it easy to get more information?

☐ Yes

☐ No

If yes, how did you get more information? ___

_____

_____

If no, please explain. _____

_____

_____

3. Whose idea was it to apply? _____

_____

_____

4. Did you find it easy to obtain application forms?

☐ Yes

☐ No

If no, please explain. _____

_____

_____

5. Were the application forms easy to complete?

☐ Yes

☐ No

If no, why not? _____

_____

_____

6. Did you find the interview selection process to be fair and well handled?

☐ Yes

☐ No

If no, how could it be improved? _____

_____

_____

_____

7. Were the selection criteria fair and valid?

☐ Yes

☐ No

If no, please explain. _____

_____

_____

_____

8. Did you have any meaningful input into the siting proposed for the unit?

☐ Yes

☐ No

Would you have liked to have more input? ___

_____

_____

_____

☐ Yes

☐ No

In what way, please specify. _____

_____

9. Was the tea party process a good idea?

- ☐ Yes
- ☐ No

Did you think it was necessary?

- ☐ Yes
- ☐ No

Did you find it intimidating?

- ☐ Yes
- ☐ No

10. Was the overall process well handled?

- ☐ Yes
- ☐ No

Did you find it too difficult or complicated?

- ☐ Yes
- ☐ No

11. Is the Homeowner's Agreement appropriate?

- ☐ Yes
- ☐ No

Comments

Neighbour Pre-Occupancy Survey

I. General Profile

1. Name of Homeowner _____

2. Number of Persons in Household _____

   Age of Each _____

3. Location in relation to host family _____

II. General Response

1. Are you familiar with the pilot project?

   ☐ Yes

   ☐ No

   If yes, how did you intially hear of it? _____

2. Are you familiar with the garden suite concept? (ie. Do you recognize the intent is to accommodate a senior in a portable housing unit located in the back yard of the host family, that family being directly related to the senior. Once the senior no longer requires the unit, it is removed. As such, this is only a temporary use of the land. It cannot be occupied by anyone other than the senior.)

   ☐ Yes

   ☐ No

   If yes, how did you initially hear of it?

3. Would you have any concerns or comments related to this type of concept and the pilot project? _____

Do you feel it may affect the use and enjoyment of your property? _____

How do you generally make use of your property? _____

Will it affect the view from your property?

Will it affect the aesthetics of the neighbourhood? _____

Do you feel it may benefit the neighbourhood?

III. Process Response

1. Do you recall receiving notice to attend the tea party information sessions?

   ☐ Yes

   ☐ No

Did you attend the tea party?

☐ Yes

☐ No

If yes, why? _____

_____

_____

Did you find it useful?

☐ Yes

☐ No

Were your concerns addressed?

☐ Yes

☐ No

Did you feel it was necessary?

☐ Yes

☐ No

Lethbridge Only

5. Do you recall receiving notice of the public hearing for the rezoning application and development permit approval related to the garden suite?

☐ Yes

☐ No

6. Since you did not respond to either notice, which would have given you the opportunity to raise any objections, can it be assumed you had no objections?

☐ Yes

☐ No

Comments: _____

_____

_____

IV. General

1. How would you describe your relationship with the host family neighbours?

☐ Good

☐ Fair

☐ Poor

☐ No Relationship (Contact) _____

_____

2. May we contact you again once the unit has been in place for two to three months to get your reaction at that time?

☐ Yes

☐ No

APPENDIX II

POST-OCCUPANCY SURVEYS

Occupant Survey

Name: _____

_____

I. Current Status

1. Has the status of your health changed at all since we last met?

- ☐ Yes
- ☐ No

If yes, in what way? _____

_____

_____

2. How would you rate your health at present?

- ☐ Good
- ☐ Satisfactory
- ☐ Poor
- ☐ Very Poor

3. Are you now receiving any home care services not received when we last met?

- ☐ Yes
- ☐ No

If yes, what services? _____

_____

_____

What cost, if any? _____

_____

_____

4. Are you receiving any government assistance programs such as SCRAP?

- ☐ Yes
- ☐ No

If yes, which program? _____

_____

_____

_____

_____

II. Lifestyle/Care and Service

1. What do you like most about your present living arrangements?

- ☐ Privacy/security
- ☐ Independence
- ☐ Location (distance to shopping)
- ☐ Local Amenities (community facilities)
- ☐ Design/Layout/Special Features
- ☐ Friends/Social Contacts
- ☐ Proximity to Family

Other, specify _____

_____

_____

2. What do you dislike the most about your present living arrangement?

- ☐ Lack of security
- ☐ Lack of independence
- ☐ Lack of privacy
- ☐ Distance to shopping areas
- ☐ Distance to other community/social facilities (eg. church, seniors drop-in)
- ☐ Poor design/layout/lack of special features
- ☐ Lack of friends and social contact
- ☐ Proximity to family

Other, specify _____

_____

_____

3. How independent of your family do you feel in the garden suite?

- ☐ Very Independent
- ☐ Quite Independent
- ☐ Not Very Independent

4. Has your degree of independence changed since moving into the garden suite?

- ☐ More
- ☐ Less

Why? _____

_____

_____

5. What support and care services does your family now provide?

- ☐ Regular Visits/Companionship
- ☐ Shopping/Errands
- ☐ Meals, Preparation and Delivery
- ☐ Attending Medical Appointments
- ☐ Nursing Assistance
- ☐ Household Chores
- ☐ Social and Other Needs
- ☐ Transportation
- ☐ Bathing and Other Personal Assistance

6. Has the degree of support increased since you moved into the unit?

- ☐ Yes
- ☐ No

If yes, in what way? _____

_____

_____

7. Which family member provides the most support?

_____

_____

_____

8. What services do you provide the family?

_____

_____

_____

9. Have you been able to maintain your social contacts?

- ☐ Yes
- ☐ No

If no, why not?_____

_____

_____

_____

10. Do you now use any local community facilities?

- ☐ Yes
- ☐ No

If yes, which ones?_____

_____

_____

If no, why not? _____

_____

_____

11. Do you feel a part of your neighbourhood?

- ☐ Yes
- ☐ No

If no, why not? _____

_____

_____

12. Has your overall quality of life improved since moving into the unit?

- ☐ Yes
- ☐ No

If yes, how has it improved? _____

_____

_____

13. Has your relationship with your family changed?

- ☐ Yes
- ☐ No

If yes, explain _____

_____

_____

_____

_____

14. How would you rate/compare your garden suite arrangement to your former living arrangement?

_____

_____

_____

_____

_____

_____

_____

15. What reasons would cause you to move?

- ☐ Ill Health
- ☐ Family Problems/Conflicts
- ☐ Neighbour Problems/Conflicts
- ☐ Dislike of Unit

Other, Specify _____

III. Unit Assessment

1. How well does your garden suite measure up to your initial expectations? _____

2. How do you generally feel about the following unit features?

Size _____

General Layout _____

Furnishability _____

Special Features _____

Privacy _____

Security _____

Independence _____

Use of Yard Space _____

3. Are you pleased with the following interior design features:

General Decor _____

Wall Finishes _____

Floor Finishes _____

Location of Entrance _____

Number of entrances _____

Location of Windows _____

Type of Windows _____

Number of Windows _____

Lighting _____

Strorage space _____

Other Features, specify _____

4. How convenient to use are your unit amenities?

Is your kitchen convenient to use?

Are your appliances easy to use?

Is your bathroom easy to use?

5. How effective is the insulation of your unit (drafts, comfort)?

- ☐ Not very
- ☐ Quite
- ☐ Very

6. How effective is the ventilation system (air flow)?

- ☐ Not very
- ☐ Quite
- ☐ Very

7. How effective is the heating system?

- ☐ Not very
- ☐ Quite
- ☐ Very

8. What safety features have been built into your unit, if any? (hand rails, grab bars, intercom) _____

9. What additional safety features would you like, if any? _____

10. How accessible is your unit (how easy is it to enter and move about your unit)?

- ☐ Not very
- ☐ Quite
- ☐ Very

11. How comfortable is your unit overall?

- ☐ Not at all comfortable
- ☐ Not very
- ☐ Somewhat
- ☐ Quite
- ☐ Very comfortable

12. What would you change, if anything?

13. How do you feel about the exterior appearance (aesthetics) of the unit?

14. Are you pleased with the exterior design features (exterior wall finishes, special features such as the porch)?

15. Is the location relative to the host dwelling to your liking?

- ☐ Yes
- ☐ No

If no, why not? _____

16. Is the walkway to your liking (if appropriate)?

- ☐ Yes
- ☐ No

If no, why not? _____

IV. Delivery

1. Did you encounter any problems in moving into the unit?

- ☐ Yes
- ☐ No

If yes, what were they? _____

2. Were your concerns/problems dealt with expeditiously?

3. What could have been done to make the move more easy for you?

Host Family Survey

Name: _____

_____

I. Current Status

1. Has the occupant's state of health changed since moving into the unit?

☐ Yes

☐ No

If yes, in what way? _____

_____

_____

II. Lifestyle/Care and Service

1. Which of the following support services do you presently provide? Approximately how many hours a week for each?

___ Regular Visit/Companionship

___ Shopping Errands

___ Meals, Preparation and Delivery

___ Accompanying to Medical Appointments

___ Social and Other Transportation Needs

___ Household Chores

___ Bathing and Other Personal Assistance

___ Nursing Assistance

Other, specify _____

_____

_____

2. What support services do you provide now that you were not able to provide, or not able to provide as easily, under the former living arrangement?

_____

_____

_____

_____

3. Has there been a change in the level of care and service required since the occupant has moved into the unit?

☐ Yes

☐ No

If yes, explain _____

_____

4. What services does the occupant provide the family?

_____

_____

_____

How does this compare with your initial expectations? _____

_____

_____

5. Has there been a change in the role of the principal care giver?

☐ Yes

☐ No

If so, explain _____

_____

_____

6. How much cooperation is there in your family with the care and support provided the occupant?

☐ None

☐ Not Much

☐ Some

☐ Quite a Lot

☐ A Lot

7. How much conflict is there?

☐ A Lot

☐ Quite a Lot

☐ Some

☐ Not Much

☐ None

8. When you or your family are away, who provides the necessary services? _____

_____

_____

9. What, if any, disadvantages of the former living arrangements have been eliminated by the garden suite? _____

10. Has the current living arrangement eliminated stress you formerly experienced with such factors as:

- ☐ Concern over Health and Safety
- ☐ Concern over Security
- ☐ Time Spent on Care Due to Proximity
- ☐ Concern of Occupant's Future
- ☐ Concern over Adequate General Care
- ☐ Concern over Social Contact

Others, specify

11. Has the quality of your family lifestyle been affected by the garden suite arrangement?

- ☐ Yes
- ☐ No
- ☐ If yes, explain _____

_____

_____

12. Has your relationship with the occupant changed since they moved into the garden suite.

- ☐ Yes
- ☐ No

If yes, explain _____

_____

_____

13. Overall, how pleased are you with the current living arrangements?

- ☐ Not at all pleased
- ☐ Not very
- ☐ Somewhat
- ☐ Quite
- ☐ Very pleased

14. What aspects of the current living arrangements pleases you most? _____

_____

_____

_____

What aspects concern you the most? _____

_____

_____

_____

15. How does the arrangement measure up to your initial expectations? _____

_____

Explain._____

_____

_____

_____

_____

_____

16. For what reasons would the occupant move out?

- ☐ Ill Health
- ☐ Family Problems/Conflicts
- ☐ Neighbour Problems/Conflicts
- ☐ Dislike of Unit

Other, specify _____

_____

_____

III. Unit Assessment

1. Overall, how pleased are you with the appearance/aesthetics of the unit?

- ☐ Not at all pleased
- ☐ Not very
- ☐ Somewhat
- ☐ Quite
- ☐ Very pleased

2. What suggestions can you offer for improving the unit appearance? _____

_____

_____

_____

_____

_____

3. Overall, how pleased are you with the design and general layout of the unit?

- ☐ Not at all pleased
- ☐ Not very
- ☐ Somewhat
- ☐ Quite
- ☐ Very pleased

4. What suggestions can you offer for improving the unit? _____

_____

_____

5. What aspects of the unit please you most (aesthetics, design, cost)? _____

_____
_____
_____
_____
_____

IV. Siting, Placement, Delivery

1. Now that the unit is in place, how do you feel about the way it is sited (relationship to host dwelling, setbacks, orientation)? _____

_____
_____
_____

What would you change, if anything? _____

_____
_____
_____

2. Has your yard amenity space been affected? Or the use and enjoyment of your property?

☐ Yes
☐ No

If yes, explain _____

_____
_____

3. Are you experiencing any parking problems?

☐ Yes
☐ No

If yes, explain _____

_____
_____

4. Does the garden suite have its own mailing address (Lethbridge only)?

☐ Yes
☐ No

If no, should it? _____

_____
_____

5. How would you generally rate the site preparation, servicing hookup and placement process?

☐ Very satisfactory
☐ Satisfactory
☐ Quite satisfactory
☐ Not very satisfactory
☐ Not satisfactory at all

_____
_____
_____
_____
_____

6. Were you unduly imposed upon (ease, timing, noise)?

☐ Yes
☐ No

If yes, explain _____

_____
_____

7. Were there any problems you encountered which could have been avoided?

☐ Yes
☐ No

If yes, explain _____

_____
_____

8. Do you feel the entire placement process could have been better handled?

☐ Yes
☐ No

If yes, explain how _____

_____
_____

9. Since placement, has the unit been well managed?

☐ Yes
☐ No

If no, explain _____

_____
_____

10. Have any concerns been expeditiously handled?

☐ Yes
☐ No

If no, explain _____

_____
_____

11. Have your neighbours responded in any way to the unit placement?

☐ Yes
☐ No

If yes, in what way? _____

_____

_____

_____

12. Has your relationship with your neighbours changed since placement?

☐ Yes
☐ No

_____

_____

13. If there has been a negative change, what could have been done to prevent that from happening?

_____

_____

_____

Neighbour Survey

Name: _____

_____

1. Has the placement of the garden suite unit affected the use and enjoyment of your property?

   ☐ Yes
   ☐ No
   If yes, in what way? _____
   _____
   _____

2. Has your view been affected?

   ☐ Yes
   ☐ No
   If yes, in what way? _____
   _____
   _____

3. Would the enjoyment of your property and/or impact on your view be improved if the unit were sited differently on the host family's property?

   ☐ Yes
   ☐ No
   If yes, what siting changes? _____
   _____
   _____

4. How would you rate the appearance/aesthetics of the unit?

   ☐ Poor
   ☐ Fair
   ☐ Good
   ☐ Excellent
   What would you like to see changed, if anything? _____
   _____
   _____
   _____
   _____
   _____
   _____

5. Do you feel the unit's appearance and design are compatible with the neighbourhood? Does it fit in well?

   ☐ Yes
   ☐ No
   If no, explain _____
   _____
   _____

6. Would you be concerned if there were more of these units in your neighbourhood?

   ☐ Yes
   ☐ No
   If no, explain _____
   _____
   _____

7. How many is enough? _____
   _____
   _____

8. Were you affected by the site preparation, servicing hook ups and placement process?

   ☐ Yes
   ☐ No
   If yes, in what way? _____
   _____
   _____

9. Has your relationship with your neighbour changed since the unit has been placed?

   ☐ Yes
   ☐ No

10. If the change is a negative one, what could have been done to prevent it? _____
    _____
    _____
    _____
    _____

11. Has your initial opinion of the garden suite concept changed since the unit has been placed (now that you have seen it)?

☐ Yes

☐ No

If yes, explain why? _____

_____

_____

10. Would you ever consider the concept for your own parents or grandparents?

☐ Yes

☐ No

If no, why not? _____

_____

_____